ADMINISTRATING ON!TRACK

Training Documentation
Web – Release 2.6
June 2017

1. AGENDA

Short introduction to Hilti

ON!Track – Web Application

- Look & Feel
- Location – Manage your company structure
- Assets – Maintain and find them when needed
- Employees – Responsibilities for assets and location
- Working with templates & reports
- Transfers & general setup

Hardware

Support

1.1 THIS IS HILTI

- **Founded**
  1941 in Schaan, Liechtenstein
- **Family owned company**
  All shares and participation certificates
  are held by the Martin Hilti Family Trust
- **Construction technology**
  World market leader for professional fastening
  and demolition technology
- **Global reach**
  Present in more than 120 countries
- **International team**
  Some 21,000 worldwide employees
- **Unique characteristic**
  Direct sales model

HILTI

1.2 WHAT IS ON!TRACK?

- Hilti ON!Track is the professional solution for keeping track of your plant and materials, especially for contractors who operate across multiple sites and locations.

- Thanks to the cloud-based software, every piece of available equipment may be recorded, registered, and efficiently managed.

- Rather than questions, ON!Track supplies you and your employees with answers – and reliable information.

- Hilti ON!Track also helps you to manage health and safety: all the required and existing certificates, as well as maintenance and training dates, are easy to record, store and access.

1.3 HOW IS ON!TRACK STRUCTURED?

ON!Track as solution has three main pillars

1. **Software** which can be accessed via Web-Application (from any desktop PC or Notebook using a web browser (Internet Explorer, Google Chrome, Firefox) or via Mobile Application (for Android and iOS supported mobile clients).

2. The RFID/bar code tags are the **Hardware** piece of ON!Track; they are used to mark each asset and enable a fast and convenient identification

3. Support is provided to implement ON!Track in a fast and reliable manner as well as for training or further improvement of the usage of ON!Track. This **Service** part helps to use it in best possible way.

1.4 WEB-APPLICATION AND MOBILE APPLICATION

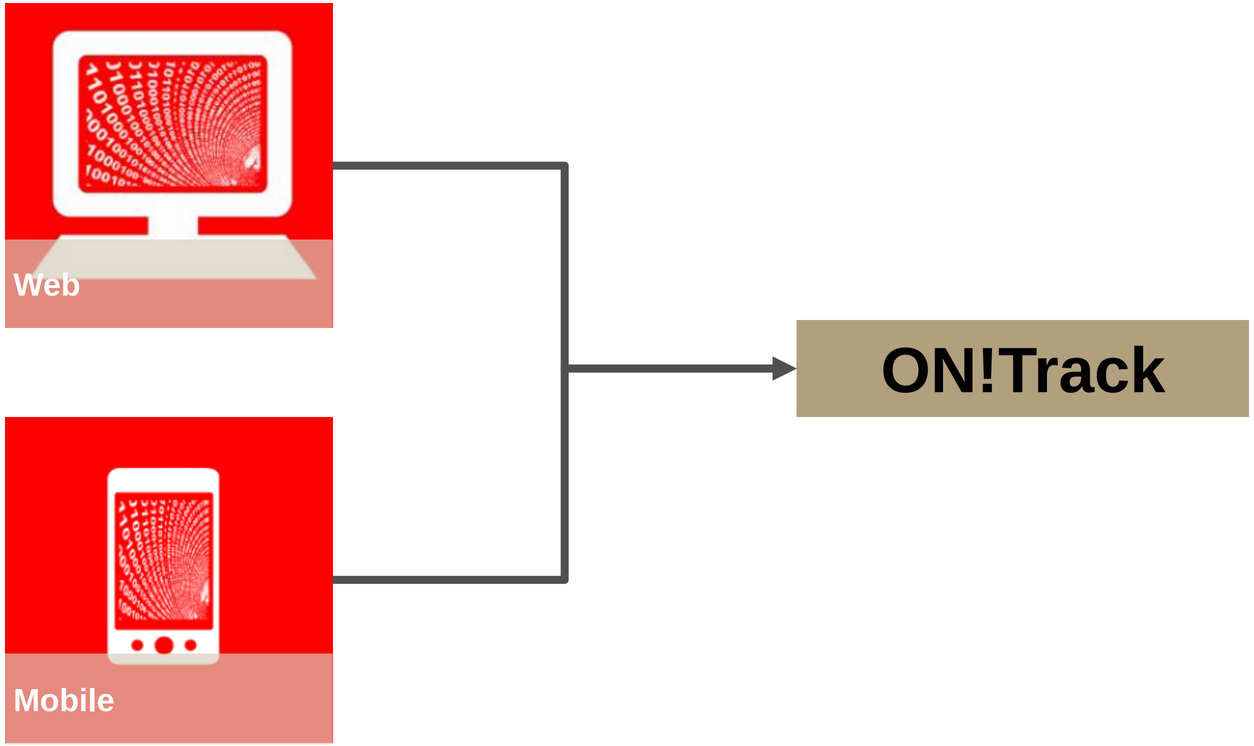
There are two ways to access Hilti ON!Track which have a specific functional scope and are dedicated to different user groups. This should provide a maximal user convenience and efficiency in using it.

Web Application

- Provides the full functional scope
- Dedicated to administrators in warehouses or central offices which need the full functional scope and have a local work station (PC, laptop)

Mobile Application

- Provides the full functional scope
- Dedicated for users mainly transferring assets, checking inventory, tagging and identifying assets

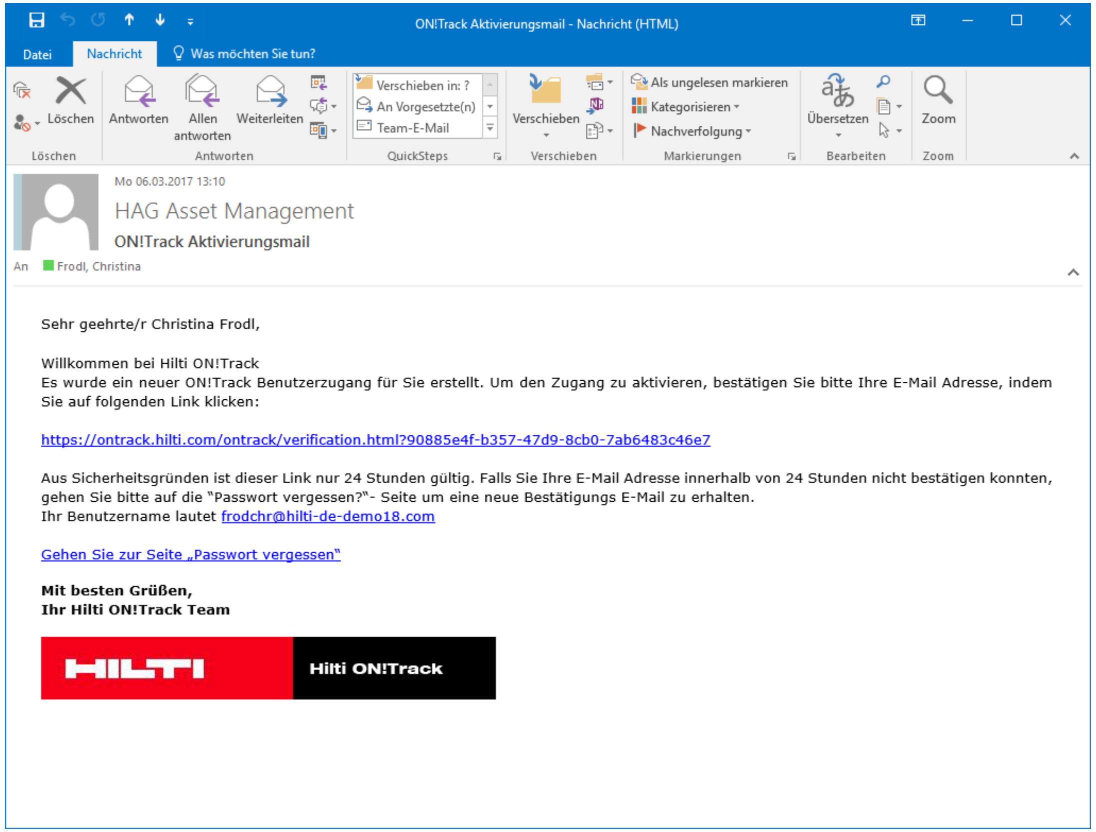


1.5 GETTING STARTED WITH ON!TRACK – ACTIVATION MAIL

Work steps

1. Open your email
2. Click on the activation link
3. Type in your user name
4. Choose your own password
5. Download the app to your mobile phone
6. For Android phones use the Google Play Store – for Apple phones use the Apple Store
7. Search for Hilti ON!Track
8. Install / Download App Hilti ON!Track

Screenshot



2. WEB APPLICATION

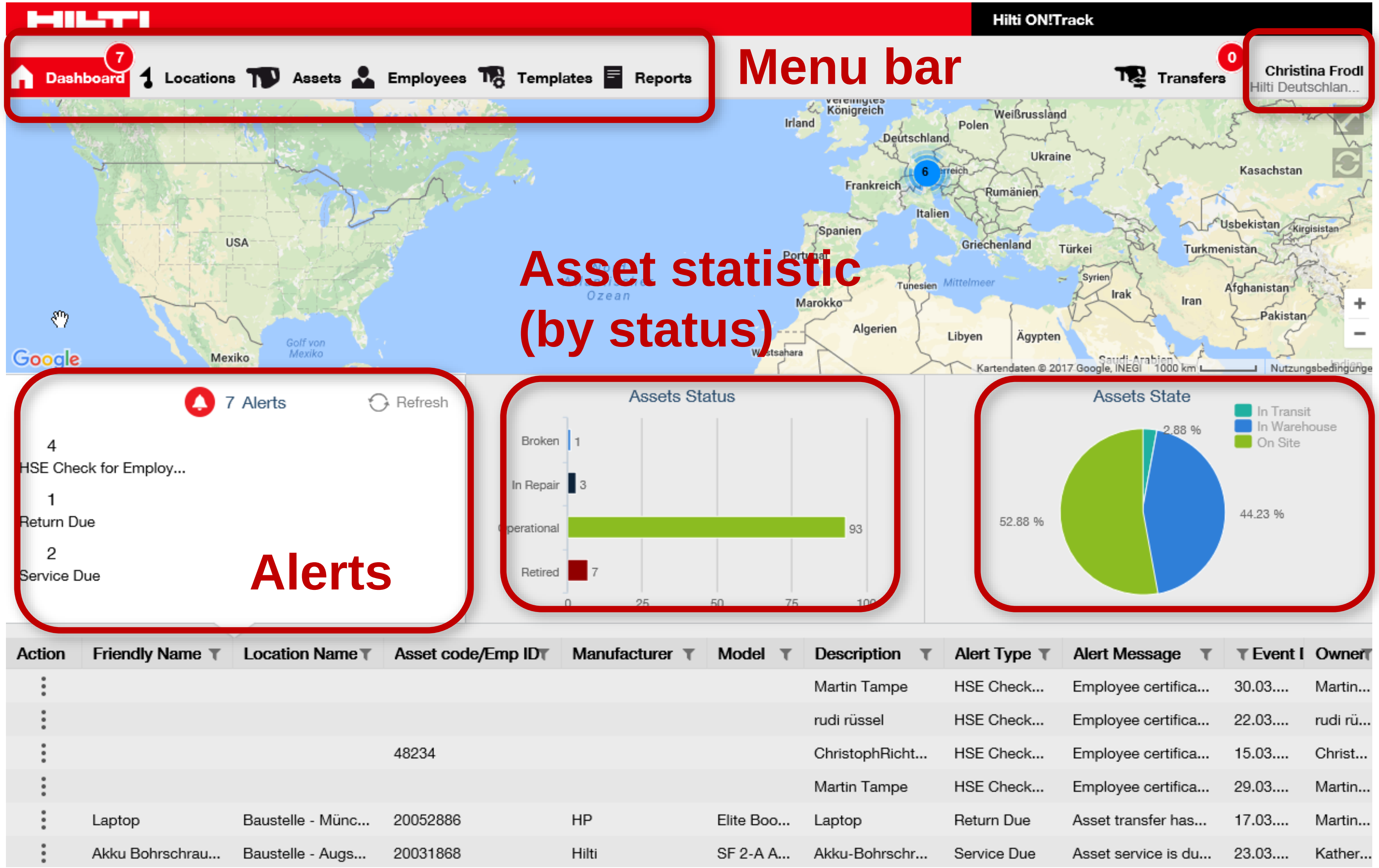
BIBLIOGRAPHY I

BIBLIOGRAPHY II

BIBLIOGRAPHY III

12. User settings

2.1 LOOK & FEEL



General Setup

Asset statistic (by location)

2.2 GENERAL TOPICS – ASSET SEARCH

Most relevant is the search of assets - outlined in this scenario.

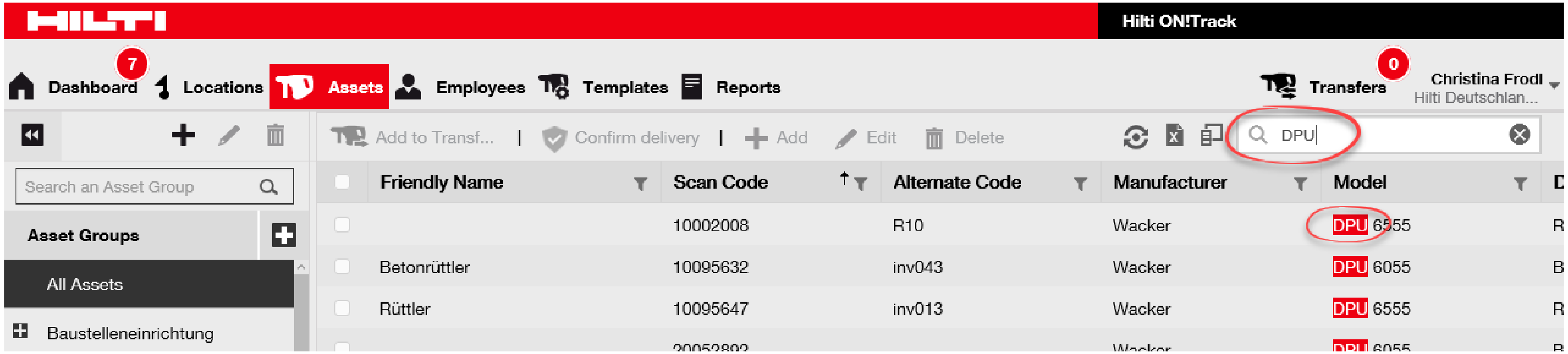
Work steps

1. Click on menu ‘Assets’
2. Click on the asset group you are searching for
3. Type in a search term in search field; results of this search are shown immediately in the right lower part of the screen

Important to know

- You don’t need to use asterisk like ‘*’ or ‘$’ to improve search .
- Search is done while entering the search term at once (no need to ‚confirm‘ search term).

Screen shot



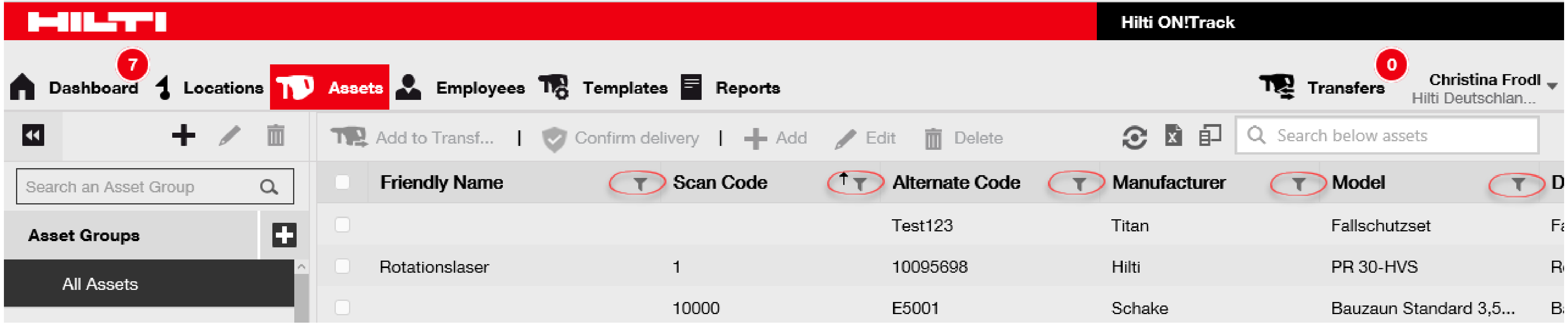
2.3 GENERAL TOPICS – FILTER TABLES

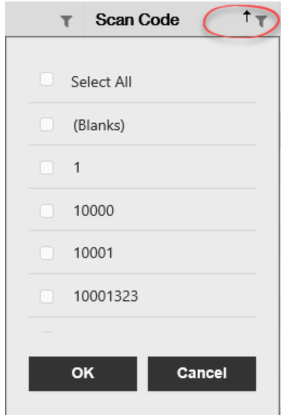
Lists can be sorted to improve convenience of work.

Work steps

1. Get a list of items like search result for assets
2. Modify the list in various ways like:
   a) click on header of column to sort it in ascending or descending order
   b) use filter symbol to get more precise results

Screen shot





2.4 GENERAL TOPICS – CUSTOMIZING TABLES

Columns in tables can be changed with regards to column sequence and size of column.

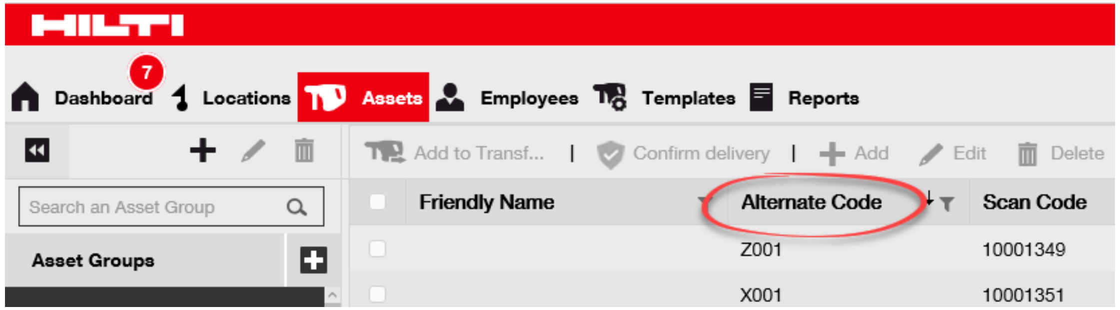
Work steps

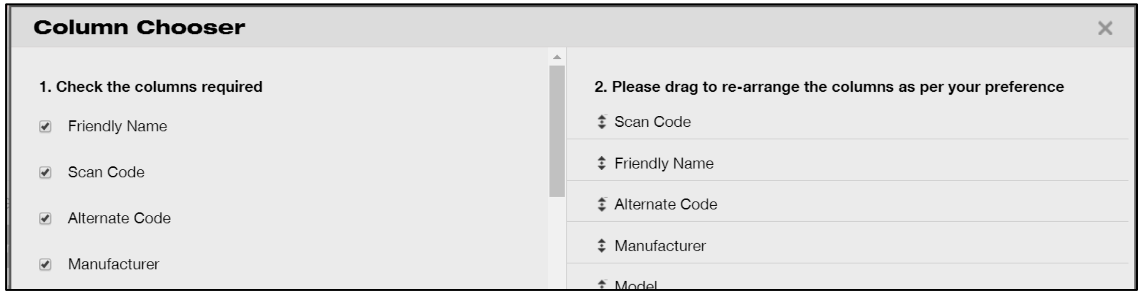
1. Sequence of columns can be changed by clicking on title of it, keep mouse button clicked and move it to different area in table.
2. Size of a column can be changed by clicking between two columns and adjusting the size while keeping the mouse button clicked.
3. With icon ‘Available columns’ it is possible to add or remove columns as needed.

Important to know

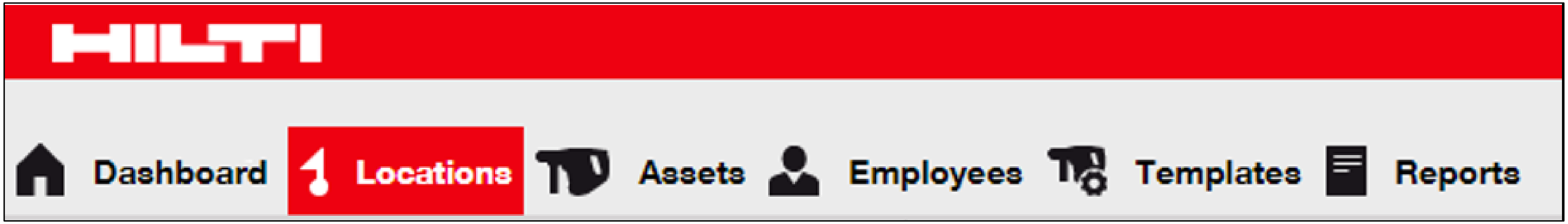
- ➢ Changes to grid columns are saved on user level

Screen shot





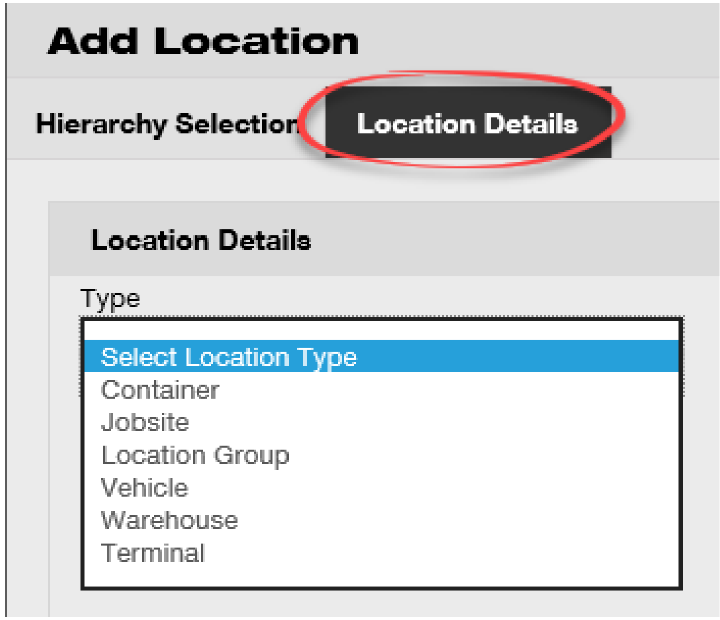
3. LOCATIONS



3.1 LOCATIONS – LOCATION TYPES

Locations reflect the structure of the company which can have different types. These location types help to structure your company in ON!Track.

Screenshot



Important to know

- Location group can be
  - Container
  - Jobsite
  - Location Group
  - Vehicle
  - Warehouse
  - Terminal (predefined by asset status i. e. retired)

3.2 LOCATIONS – ADD A NEW LOCATION

This scenario describes the creation of a new location.

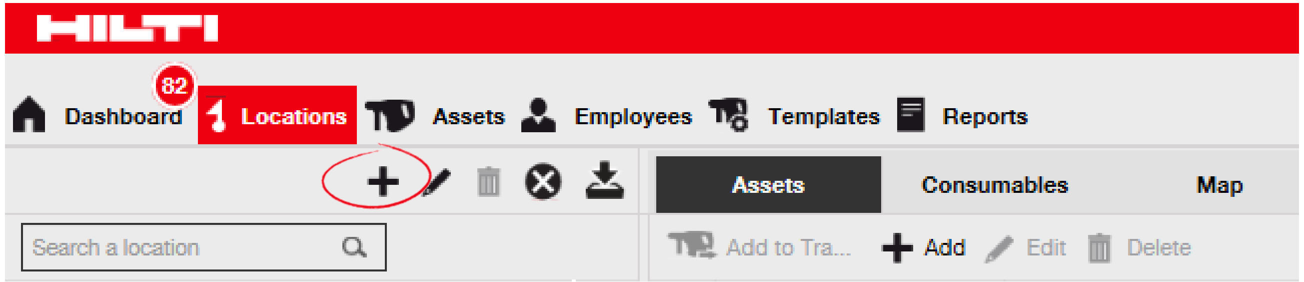
Work steps

1. Click on **Locations** in the main-navigation bar.
2. Click on the **Plus icon** in the sub-navigation bar.
3. Choose a **parent for the new location.**
4. Click on **Save and Next** at bottom of the selection screen to proceed to the data entry on the Location Details tab.
5. Fill out the **data required** on Location Details tab. Click on **Save and Exit** at bottom of the data entry screen to complete the addition of a new location.

Important to know

- Mandatory fields are marked in red

Screen shot



3.3 LOCATIONS – EDIT A LOCATION

Existing locations can be edited according in this work procedure.

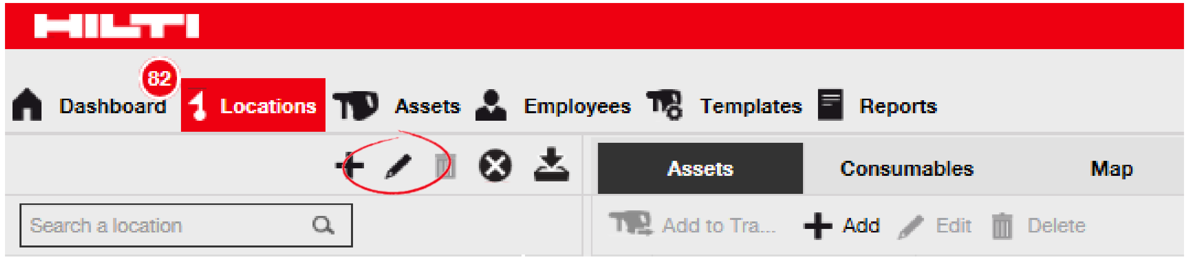
Work steps

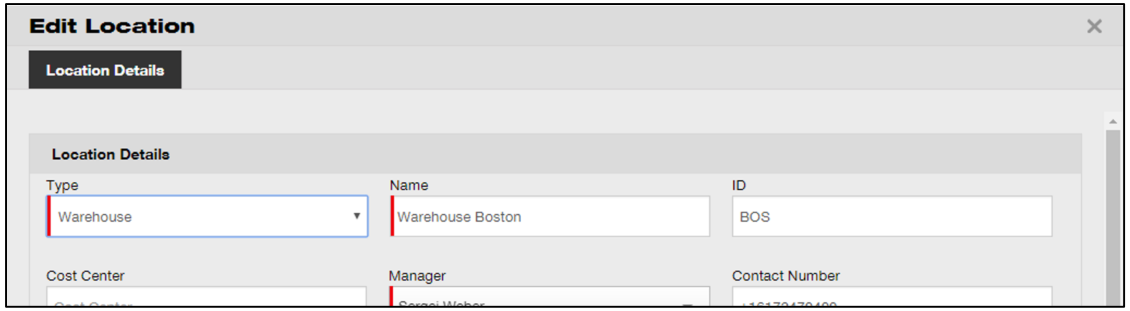
1. Click on **Locations** in the main-navigation bar.
2. Click on the **Plus icon** to expand the vertical navigation below.
3. Click on the **Location to be edited**.
4. Click on the **Pencil icon** to edit the selected location.
5. Edit the **locations details** as required.
6. Click on **Save and Exit** at bottom of the editing screen to complete editing the location.

Important to know

➢ Mandatory fields are marked in red.

Screen shot





3.4 LOCATIONS – DELETE LOCATION

If a location is not needed anymore it can be deleted.

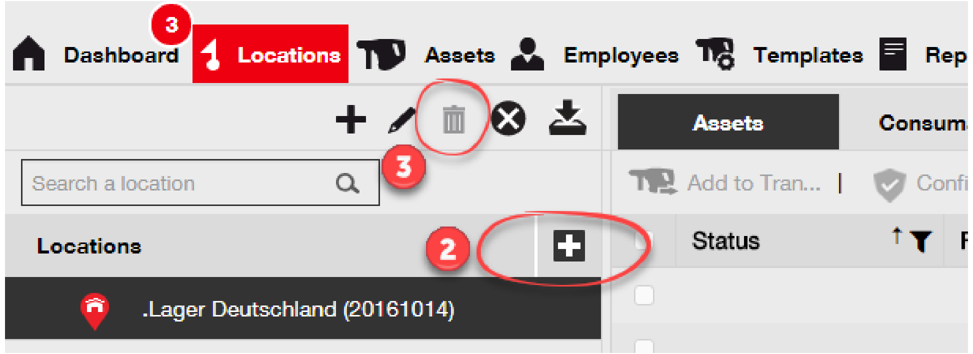
Work steps

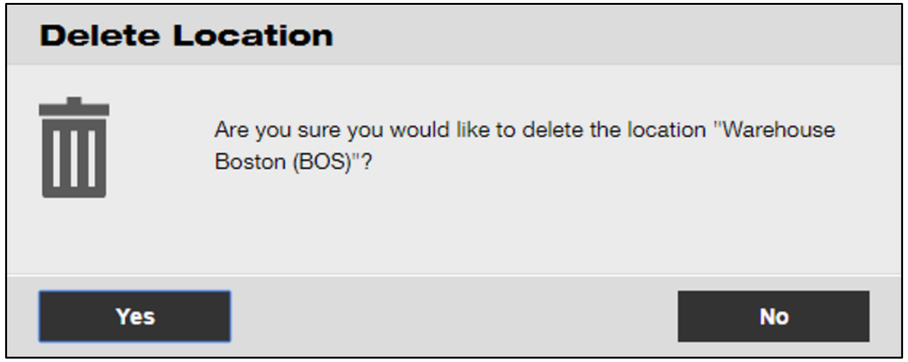
1. Click on **Locations** in the main-navigation bar.
2. Click on the **Plus icon** to expand the Locations structure below.
3. Select the **location to be deleted** by clicking on it.
4. Click on the **Trashcan icon** to delete the selected location; a confirmation screen opens on-click.
5. Click on **Yes** to delete the respective location permanently.

Important to know

- Once deleted, data cannot be restored!

Screen shot





3.5 LOCATIONS – ARCHIVE LOCATION

If a location is not needed anymore it can be archived.

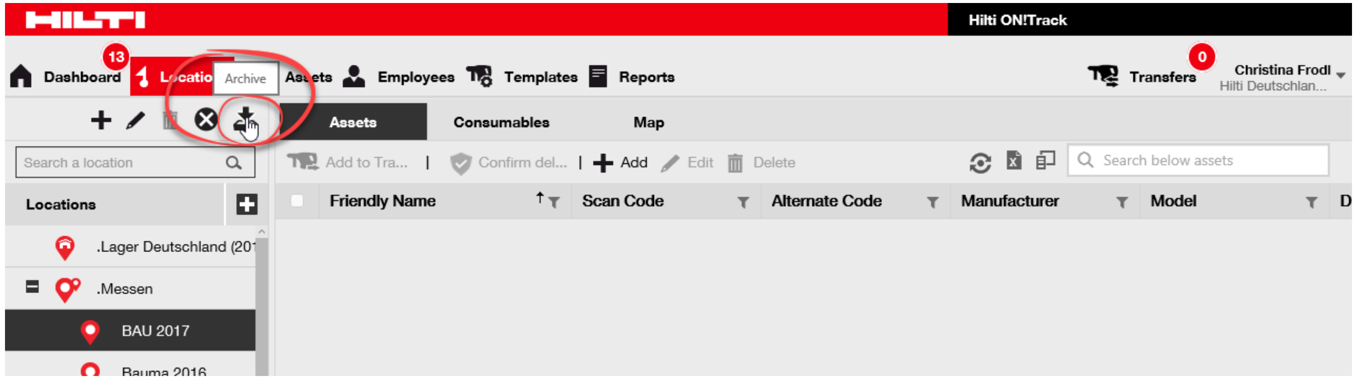
Work steps

1. Click on **Locations** in the main-navigation bar.
2. Select the **location to be archived** by clicking on it.
3. Click on the **archive icon** to archive the selected location.
4. Click on **Yes** to archive the respective location, to cancel click on No.

Important to know

- Location should not have any assets or commodities.
- All archived locations can be found by company settings.
- Click on the Active button to activate the archived location.

Screen shot



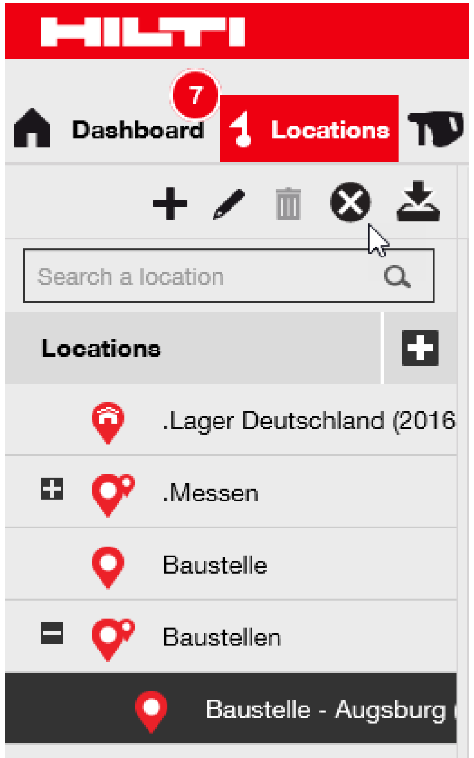
3.6 LOCATIONS – DEACTIVATE LOCATION

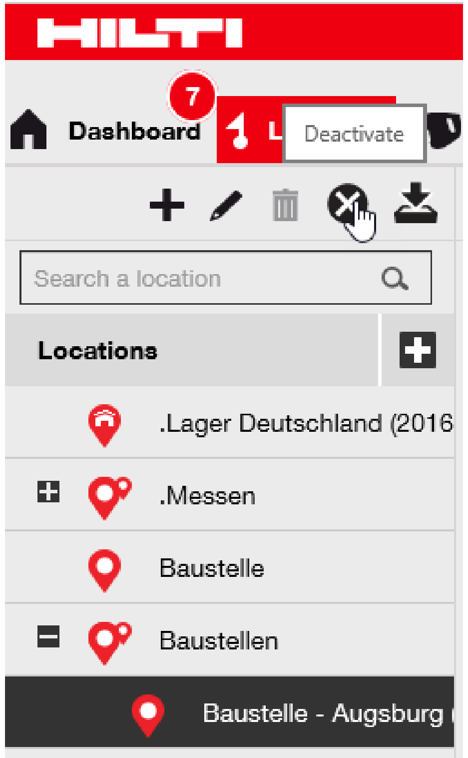
This scenario describes how you can deactivate a location, because you do not need it anymore.

Work steps

1. Click on **Locations** in the main-navigation bar.
2. Click on the **Location to be edited.**
3. Click on the **Deactivate Icon.**
4. Click on **Yes** to deactivate the location. To cancel click on No.

Screenshot





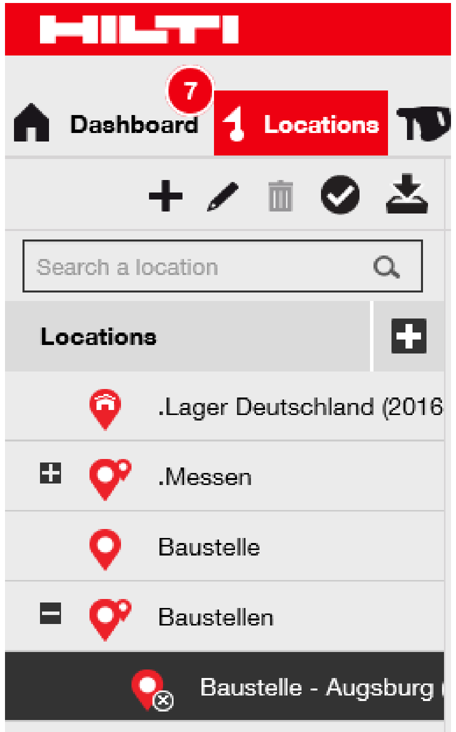
3.7 LOCATIONS – ACTIVATE LOCATION

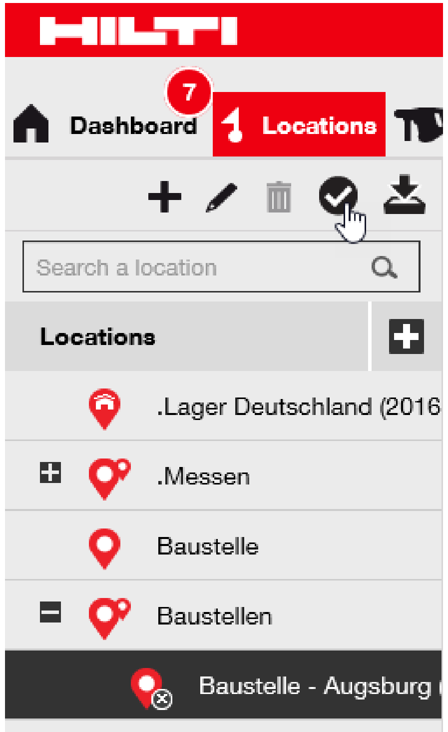
This scenario describes how you can activate a deactivated location, because you need it again.

Work steps

1. Click on **Locations** in the main-navigation bar.
2. Click on the **deactivated location**, marked with a “x” and click on the **Activate Icon.**

Screenshots





3.8 LOCATIONS – TERMINAL LOCATION

This scenario describes how you can add a terminal location and what is so special about it.

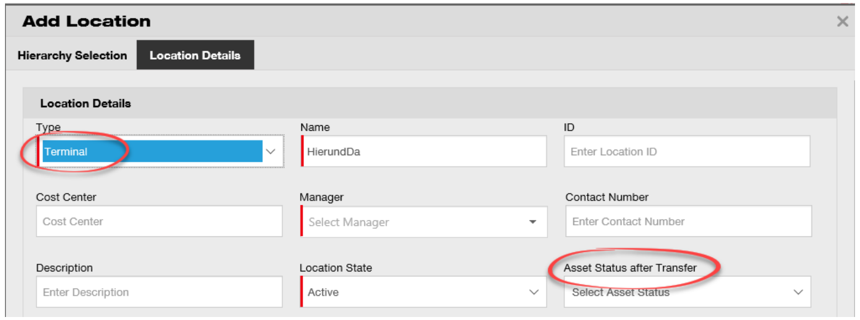
Work steps

1. Click on **Locations** in the main-navigation bar.
2. Click on the **Plus Icon** to add a location
3. Choose **a parent location** or **create a new location.**
4. Click on Save and Next
5. Select the **location type,** in this scenario **Terminal**
6. Now select the **asset status after transfer**
7. Click on **Save and Exit**

Important to know

- When transferring an asset to a terminal location, the asset's status will be changed to the asset status of the terminal location e.g. retired, in repair, etc.
- Mass change of asset status possible e.g. Repair Location
- Works only one-way: Transfer to another non-terminal location will not change the asset's status back

Screen shot

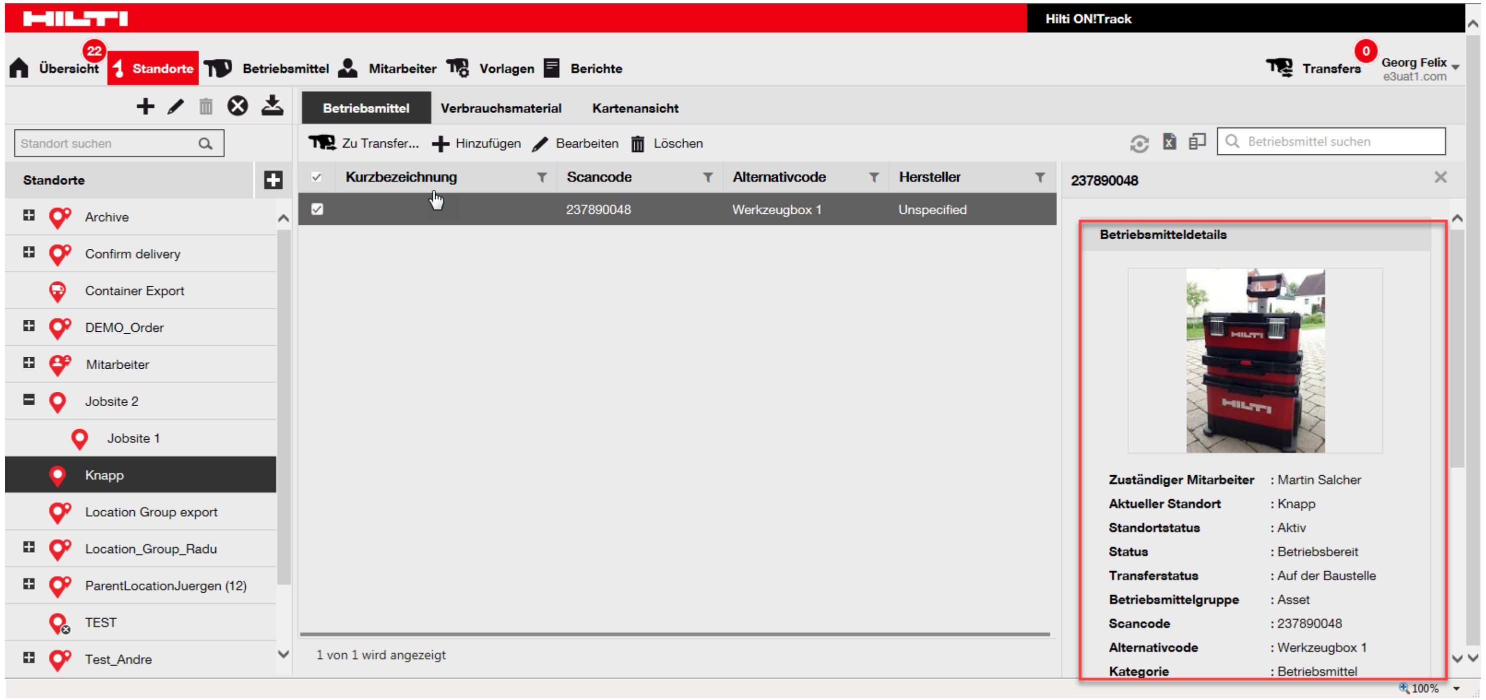


3.9 LOCATIONS – VIEW DETAILS

Important to know

- Asset details in location view: In the location view you are now able to see the asset details by clicking on the respective asset.

Screen shot



4.1 LOCATION GROUP– ADD NEW LOCATION GROUP

In case the current hierarchy is not valid anymore a new superior location can be added.

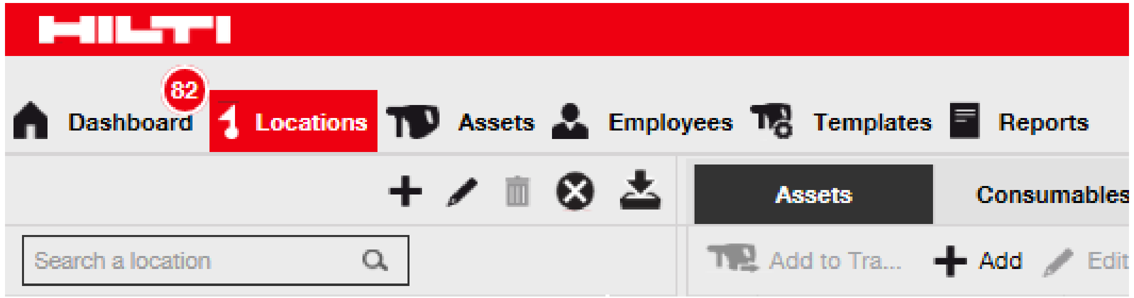
Work steps

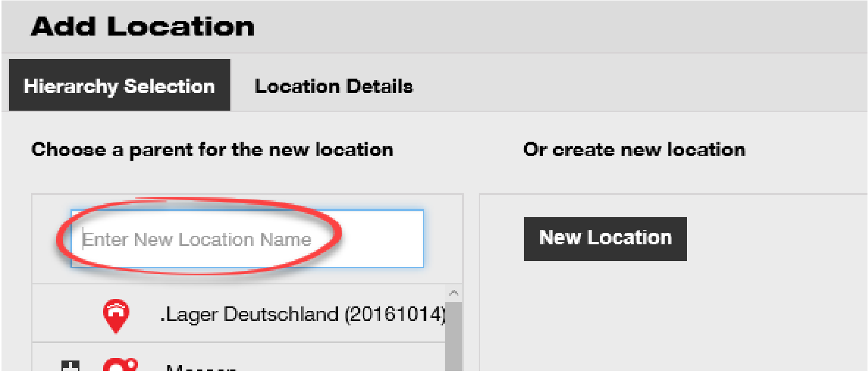
1. Click on Locations in the main-navigation bar.
2. Click on the **Plus icon.**
3. Click on **New Location.**
4. Enter a **new parent location** name in the text field.
5. Click on **Save and Next** at bottom.
6. Fill out the **data required** on Location Details tab.
7. Click on **Save and Exit** at bottom of the data entry screen.

Important to know

➢ Mandatory fields are marked in red

Screen shot





4.2 LOCATION GROUP– EDIT LOCATION GROUP

Existing superior locations can be edited.

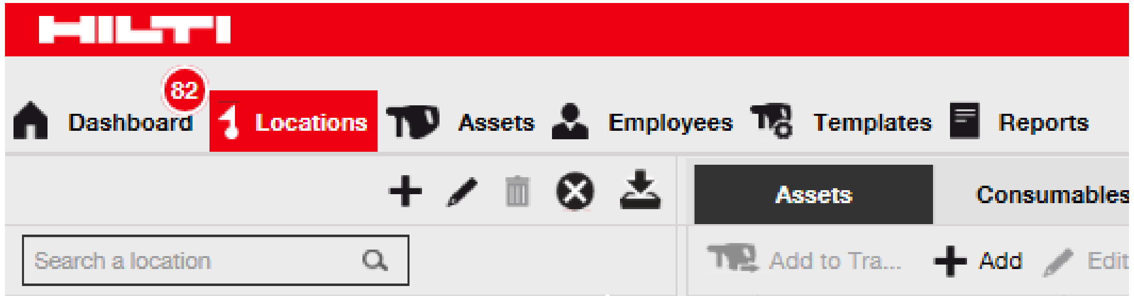
Work steps

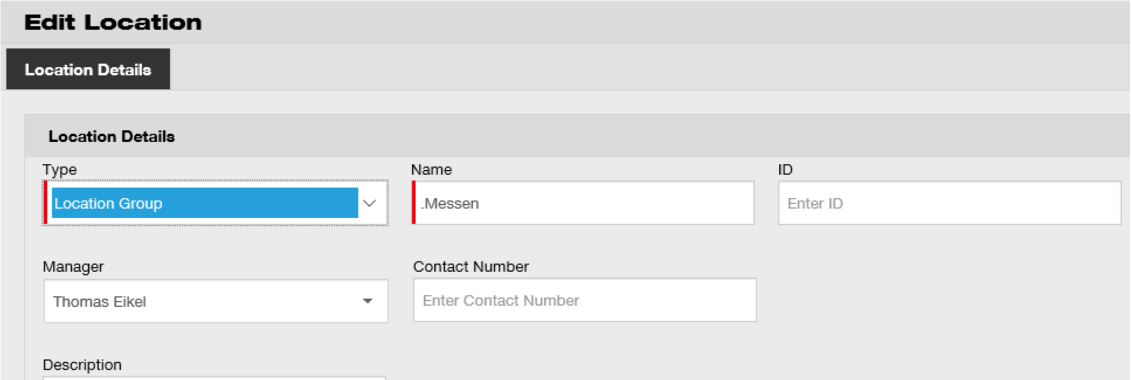
1. Click on **Locations** in the main-navigation bar.
2. Click on the **parent location to be edited**.
3. Click on the **Pencil icon** to edit the selected parent location.
4. Edit the **parent locations details** as required.
5. Click on **Save and Exit** at bottom of the editing screen to complete editing the parent location.

Important to know

- Mandatory fields are marked in red.

Screen shot





4.3 LOCATION GROUP– DELETE LOCATION GROUP

In case a superior location is not needed anymore it can be deleted.

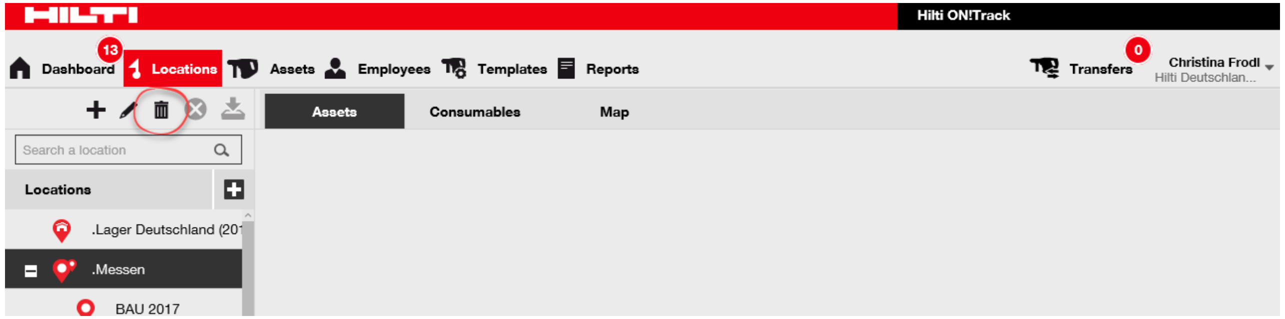
Work steps

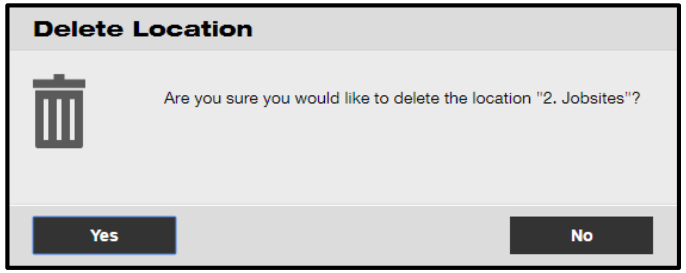
1. Click on **Locations** in the main-navigation bar.
2. Select the **parent location to be deleted** by clicking on it.
3. Click on the **Trashcan icon** to delete the selected parent location; a confirmation screen opens on-click.
4. Click on **Yes** to delete the respective location permanently; to cancel the deletion, click on No.

Important to know

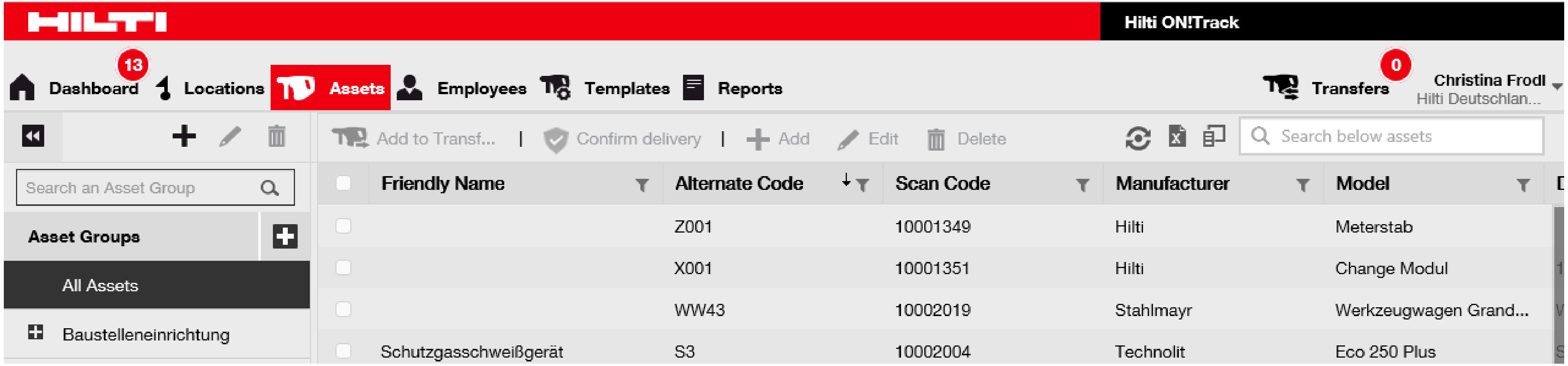
- Once deleted, the location group can not be restored anymore.

Screen shot





5. ASSETS


Hilti ON!Track
13
Dashboard
Locations
Assets
Employees
Templates
Reports
0
Transfers
Christina Frodl
Hilti Deutschlan...
Add to Transf...
Confirm delivery
Add
Edit
Delete
Search below assets
Search an Asset Group
Asset Groups
All Assets
Baustelleneinrichtung
Friendly Name
Alternate Code
Scan Code
Manufacturer
Model
Z001
10001349
Hilti
Meterstab
X001
10001351
Hilti
Change Modul
WW43
10002019
Stahlmayr
Werkzeugwagen Grand...
Schutzgasschweißgerät
S3
10002004
Technolit
Eco 250 Plus

5.1 ASSETS – LOGIC AND USAGE OF ASSET GROUPS

Asset groups help to cluster the assets in logical units.

Work steps

Important to know

- Asset groups can be designed individually, but their logic should be considered carefully
- Creation of new asset groups is possible anytime
- There is no mass update functionality available to reassign assets to different asset groups

5.2 ASSETS – MANAGING ASSET GROUPS

Asset groups can be created, modified and deleted.

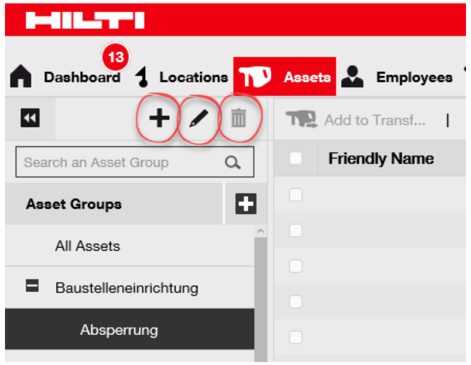
Work steps

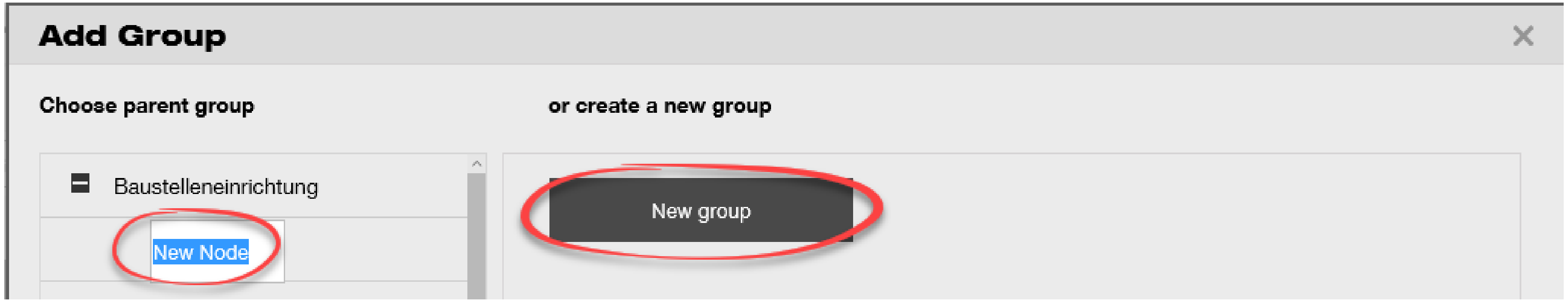
1. Click on **menu Assets**.
2. Click on first **plus symbol** underneath menu bar.
3. Creating a new group under 'Assets', click on 'Assets' in left hand structure
4. **Creating a new group under** 'Commodities' or 'Consumables' click on this title
5. **Add a name** for the new group and click 'Add'.
6. **Modify a group** by clicking on it and push 'Edit'.
7. **Delete a group** by clicking on it and push 'Delete'.

Important to know

- Plus symbol beside text 'Asset Groups' collapses or decollapses whole asset group structure
- Commodities and consumables might not be used; in this case, ignore the corresponding work steps.

Screen shot





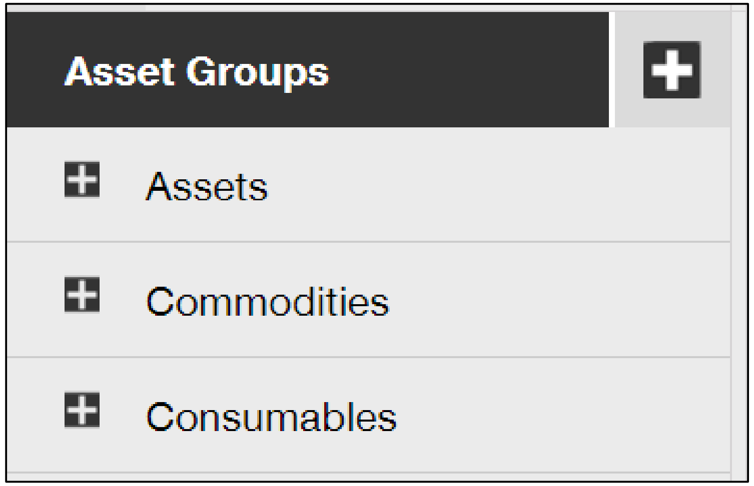
5.3 ASSETS – ASSETS, COMMODITIES AND CONSUMABLES

ON!Track supports managing different types of assets.

Important to know

- Assets are items permanently used in the company like [electronic] tools
- Commodities usually consist of large numbers of the same kind e.g. formwork & are not relevant for services and certificates
- Consumables are used while working and are fixed permanently into the work subject like nails or concrete
- This differentiation (types) triggers specific functionality in ON!Track

Screenshot



5.4 ASSETS – ADD AN ASSET

This scenario describes how to add an asset.

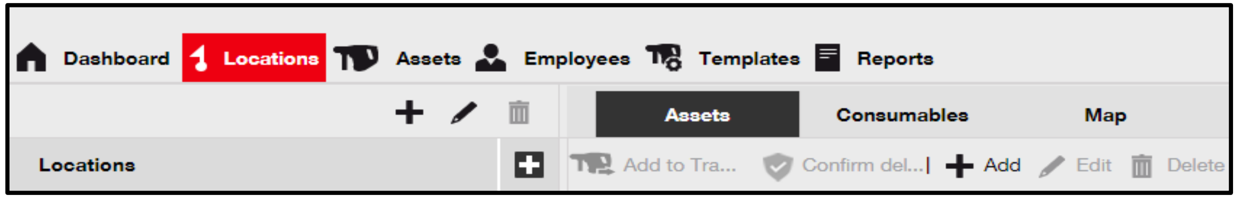
Work steps

1. Click on **Locations** in the main-navigation bar.
2. Click on **Plus icon ("Add")** to add a new asset.
3. Fill out the **data required** on Asset Details tab.
4. Click on **Save and Next** on the Managed As tab.
5. Fill out the **data required** on Managed As tab.
6. Click on **Save and Next** to proceed the data entry on the **Certificates** tab.
7. Click on **Save and Exit.**

Important to know

- Mandatory fields are marked in red.
- Although there are various approaches to add an asset, here, the simplest manual approach is described.
- In order to add Certificates or Services on this screen, they must have been previously added to ON!Track; you can add Certificates or Services under main-navigation point Templates.

Screen shot



5.5 ASSETS – ADD A CONSUMABLE

This scenario describes how to add a consumable.

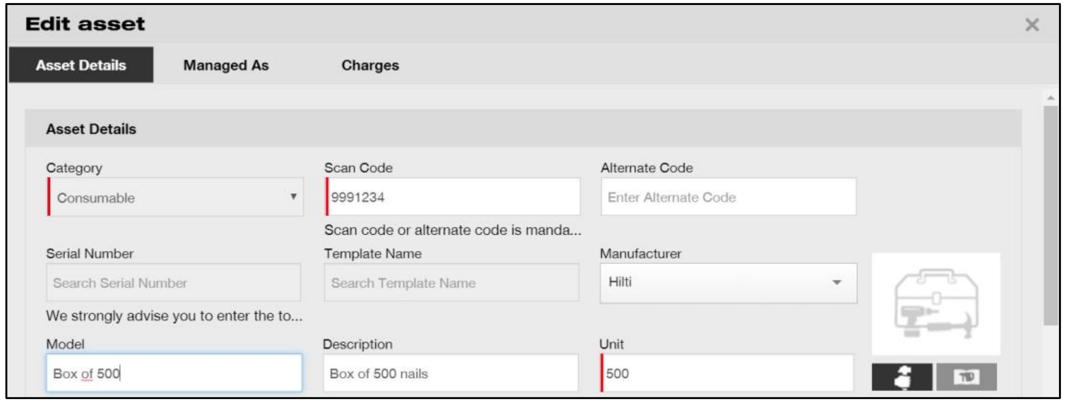
Work steps

1. Create an **asset** and define **asset type** as ‘Consumable’
2. Manage consumables by increasing stock once **delivery was received**.
3. Once **consumables** are needed at the jobsite, transfer the corresponding amount to jobsite or vehicle.

Important to know

- Consumables are fixed permanently in the work subject or are consumed while working (e. g. nails or concrete)
- ON!Track supports the management of consumables with minimum values sending alerts once minimum value has reached
- The minimum quantity of a consumable is always 1.

Screen shot



5.6 ASSETS – ADD A COMMODITY

This scenario describes how to add a commodity.

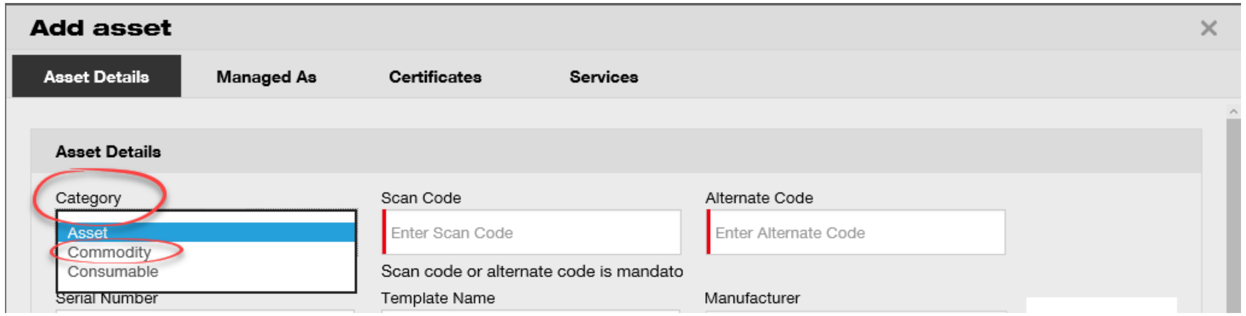
Work steps

1. Click on **Locations** in the main-navigation bar.
2. Click on **Plus icon ("Add")** to add a new commodity.
3. Select the **category**.
4. Fill out the **data required** on Asset Details tab.
5. Click on **Save and Next** on the Managed As tab.
6. Fill out the **data required** on Managed As tab.
7. Click on **Save and Next** to proceed the data entry on the **Certificates** tab.
8. Click on **Save and Exit.**

Important to know

- Mandatory fields are marked in red.

Screen shot



5.7 ASSETS – ADD HILTI ASSET BY USING SERIAL NUMBER

For Hilti tools some data is already transferred to ON!Track for a more convenient data maintenance. This could be triggered based on the serial number of the tool.

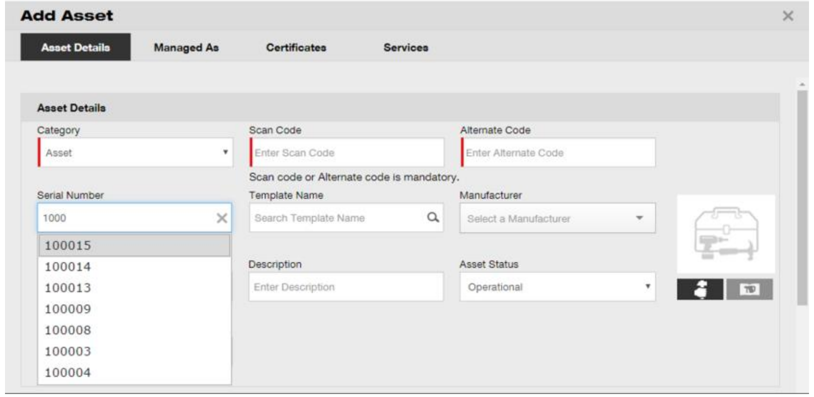
Work steps

1. Click on **Locations** in the main-navigation bar.
2. Click on **Plus icon** to add a new asset.
3. Fill out the **Serial Number field.** By selecting the serial number, which triggers prefilling of fields.
4. Click on **Save and Next** to proceed the data entry on the Managed As tab and fill out the data.
5. Click on **Save and Next** at bottom of the data screen to proceed on the Certificates and Services
6. Click 'Save and Exit' to finish data entry.

Important to know

- Mandatory fields are marked red, a complete data entry is advised.
- In order to add Certificates on this screen, they must have been previously added to ON!Track.
- In order to add Services on this screen, they must have been previously added as template to ON!Track.

Screen shot



5.8 ASSETS – EDIT AN ASSET

Asset data can be edited which is outlined in this scenario.

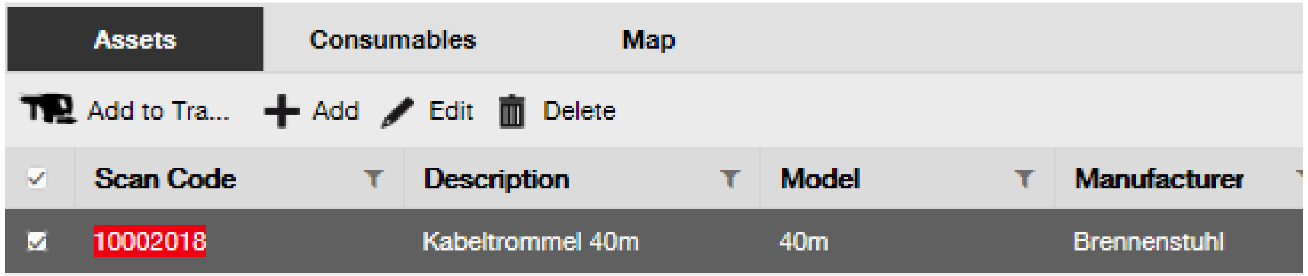
Work steps

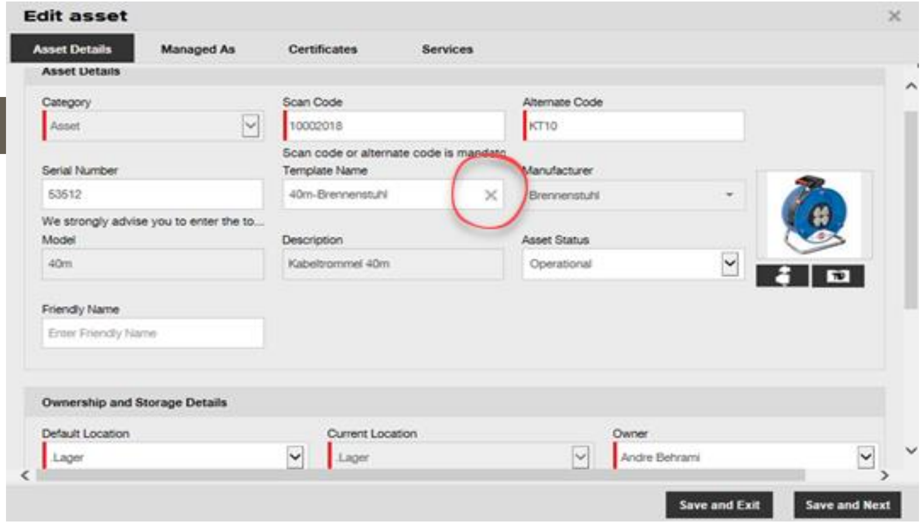
1. Click on **Assets** in the main-navigation bar.
2. Click on the **Plus icon** to expand the Asset Groups.
3. Select the **Asset Sub-Group** where the asset to be edited is included.
4. Select the **asset to be edited** by ticking the respective check box.
5. Click on **Edit** to edit the selected asset.
6. Navigate to the **respective tab and modify data.**
7. Click **Save and Exit**.

Important to know

- Mandatory fields are marked in red.
- Normally an asset is combined with a template (the fields: Manufacturer, Model, Description are grey shaded)
- Press (X) to delete this asset template, than you can re-edit the fields Manufacturer, Model, Description

Screen shot





5.9 ASSETS – CHANGE ASSET STATUS

The status of an asset reflects its readiness for usage. Status changes are described in this scenario.

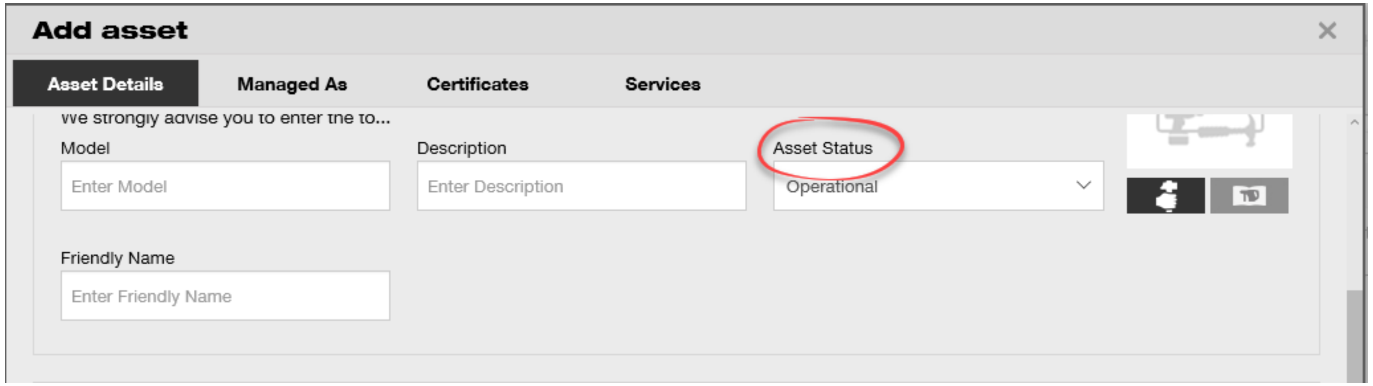
Work steps

1. Click on **Assets** in the main-navigation bar.
2. Click on the **Plus icon** to expand the Asset Groups.
3. Select the **Asset Sub-Group** where the asset to be edited is included.
4. Select the **asset to be edited** by ticking the respective check box.
5. Click on **Edit** to edit the selected asset.
6. **Change asset status** as needed.
7. Click **Save and Exit**.

Important to know

- There are five status available: Operational, Broken, in Repair, Lost or Stolen and Retired
- Asset status has impact on availability (e. g. transfer from warehouse to jobsite is not possible, if status is broken).

Screen shot



5.10 ASSETS – DELETE AN ASSET

Once the asset is obsolete or the data was wrong it could be deleted.

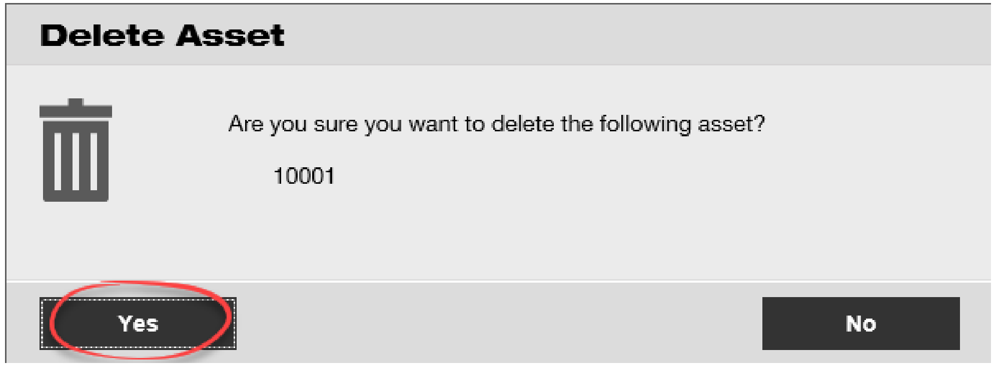
Work steps

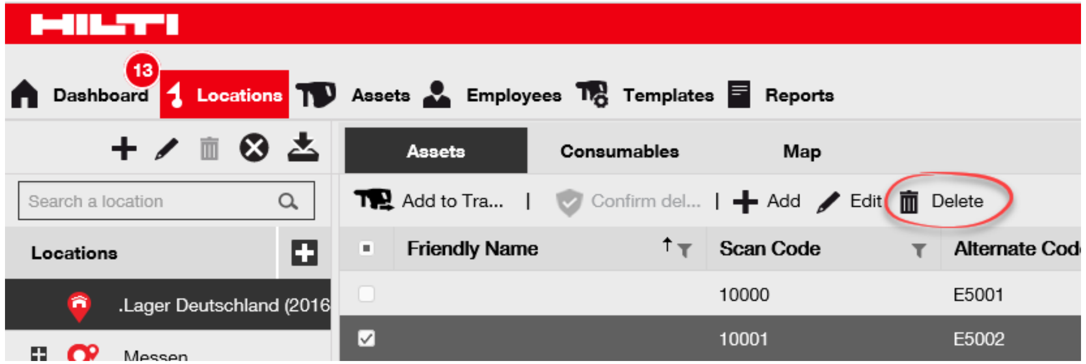
1. Click on **Assets** in the main-navigation bar.
2. Click on the **Plus icon** to expand the Asset Groups.
3. Select the **Asset Sub-Group** where the asset to be deleted is included.
4. Select the **asset** by ticking checkbox.
5. Click on the **Trashcan icon ("Delete")** to delete the selected asset.
6. Click on **Yes** to delete it. To cancel click on No.

Important to know

- Once the asset is deleted, it can not be restored anymore.
- Once an asset was transferred one time it can not be deleted anymore; the asset status then can be changed to retired.

Screen shot





5.11 ASSETS – CONFIRM DELIVERY, LONG DISTANCE & DIRECT CONFIRM

To make sure an asset has reached the receiver at the location the confirm delivery could be used.

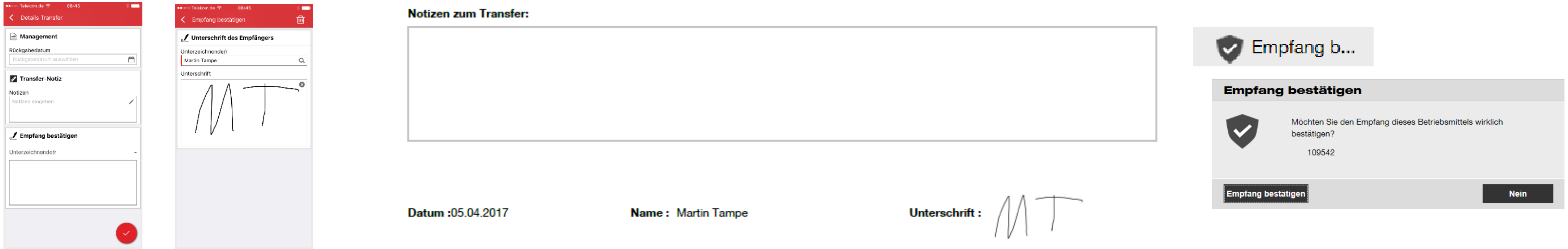
Work steps

1. Each transferred asset needs to be confirmed by web or app before further movements. This is called long distance confirm delivery.
2. If you transfer an asset direct and get a signature within the app the asset will be booked immediately without the need of confirmation. This is called short distance confirm delivery.

Important to know

- ➢ Confirm delivery needs to be activated on company level (optional company decision)
- ➢ The signature can be reviewed within the transfer history
- ➢ Long Distance is default transfer and short distance will be automatically activated, by choosing and filling the signature field
- ➢ If you transfer to a location which is owned by yourself, no confirmation is needed

Screen shot



5.12 ASSETS – RE-STOCK CONSUMABLES

Locations reflect the structure of the company which can have different types

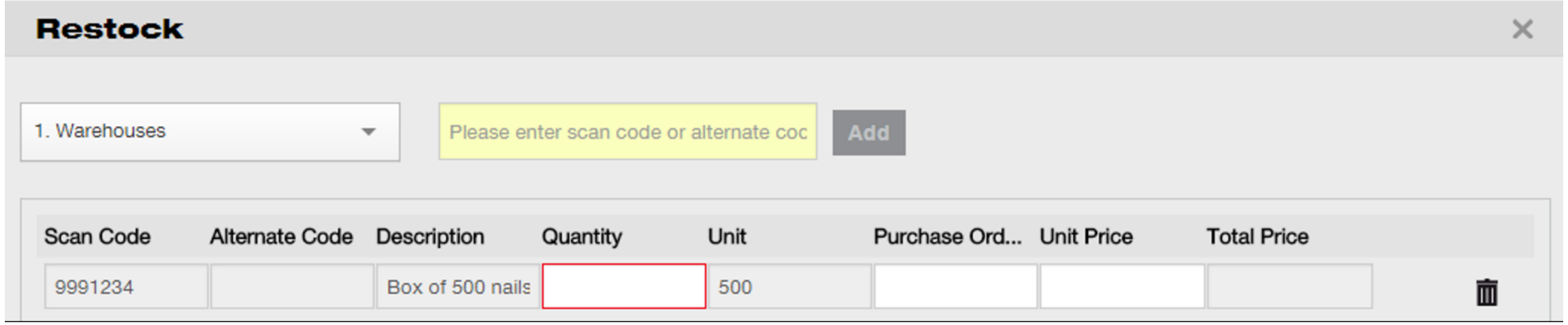
Work steps

1. Click on **Locations** in the main-navigation bar.
2. Select the **Consumables tab**.
3. Click on the **Plus icon ("Restock")**.
4. Fill in the **Scan code of the respective consumables** and click on **Add**.
5. Fill out the **data required**;, a complete data entry is advised.
6. Click on **Save** at bottom of the data entry screen to confirm the restock of the respective consumable.

Important to know

- Mandatory fields are marked red

Screen shot



5.13 ASSETS – MANAGING COMMODITIES

Commodities are items which are regularly used, but due to their nature are managed as a bunch of items.

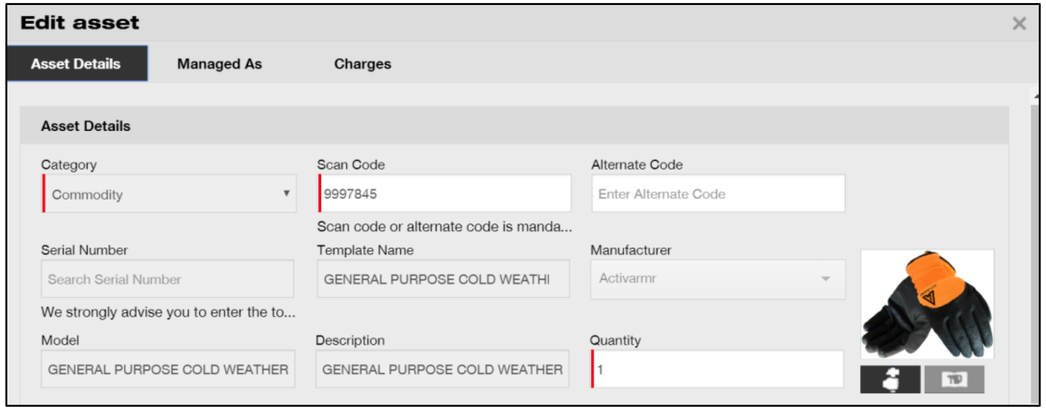
Work steps

1. Create an asset and define asset type as 'Commodity'
2. Manage commodities by removing the amount from shelf and transferring it to jobsite or vehicles.
3. Once not needed any more, transfer back to warehouse

Important to know

- Commodities are managed as a bunch of assets what means that the whole commodity group has one scan code.
- Transferring commodities means to take one item of the shelf and by that deducting the number
- Once usage has finished, their are transferred back on stock increasing the amount by one item
- For more convenient transfer commodity scan code can be labelled at the shelf

Screen shot



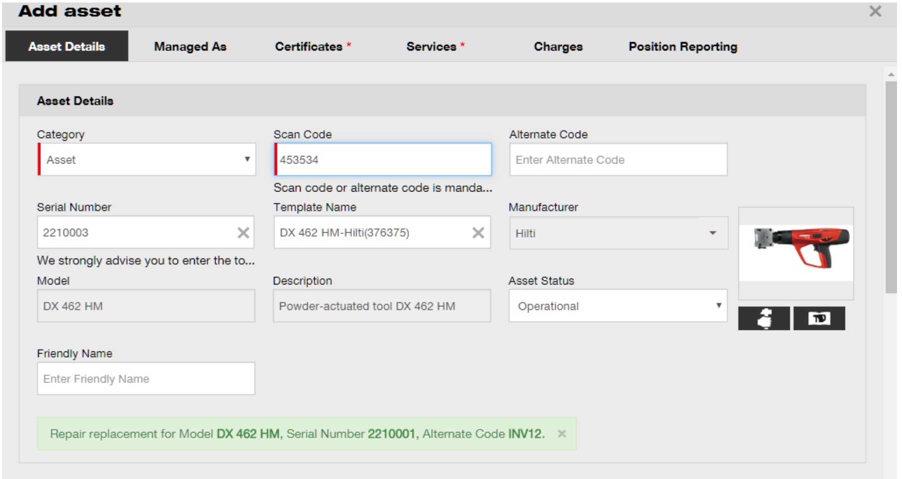
5.14 ASSETS – WARRANTY EXCHANGE

Work steps

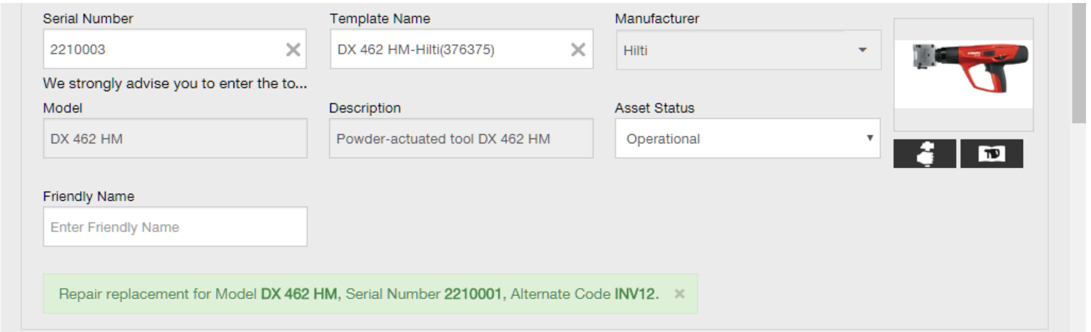
1. The broken tool is replaced by a new device with a new serial number. This must be registered again in ON!Track. A message appears that indicates, that this device is a warranty exchange. The information about which device has been replaced, appears in a green info box.
2. Registered locations and property-/ ownership conditions are automatically taken over by the replaced device.
3. Registered information on services and certificates are automatically taken over by the replaced device.

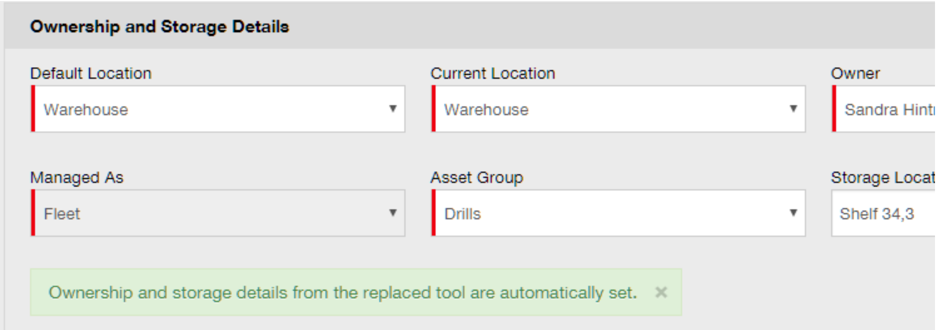
Important to know

➤ If necessary, check and adjust the planned service date and certificate date.



Screen shot





5.15 ASSETS – SAVE VIEW

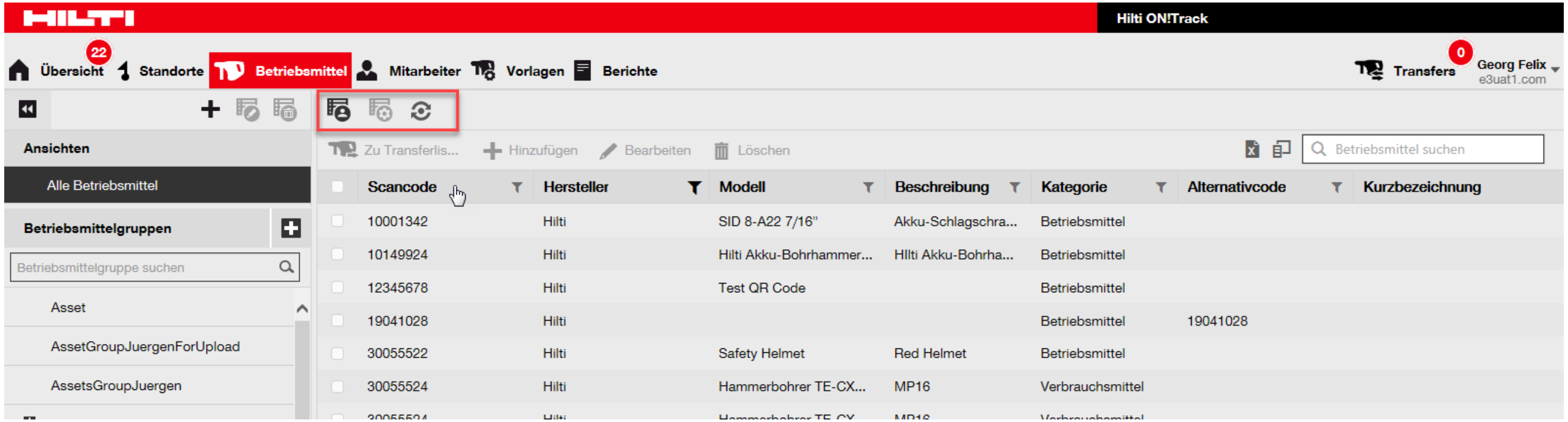
Work steps

1. Click on the asset tab and click on “all assets“.
2. Screen and / or sort your assets and move columns if necessary, to get the desired view.
3. Save the view by using the icon and select a name for this view.
4. Saved views are stored under “views”.

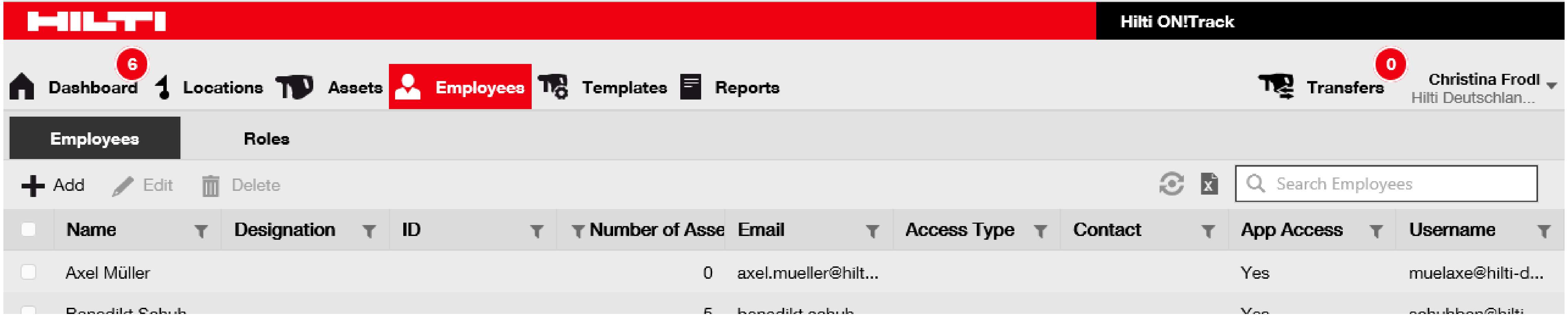
Important to know

- Click on this tab to edit the selected view.
- Click on this tab to delete the selected view.
- Click on this tab to update the invoked view after editing.

Screen shot



6. EMPLOYEES



Hilti ON!Track
6
Dashboard
Locations
Assets
Employees
Templates
Reports
Transfers
0
Christina Frodl
Hilti Deutschlan...
Employees
Roles
Add
Edit
Delete
Search Employees
Name
Designation
ID
Number of Asse
Email
Access Type
Contact
App Access
Username
Axel Müller
0
axel.mueller@hilt...
Yes
muelaxe@hilti-d...

6.1 EMPLOYEES – AUTHORIZATION ROLES

Roles help to avoid misusage or errors in using ON!Track. Each user can have a specific authorization role.

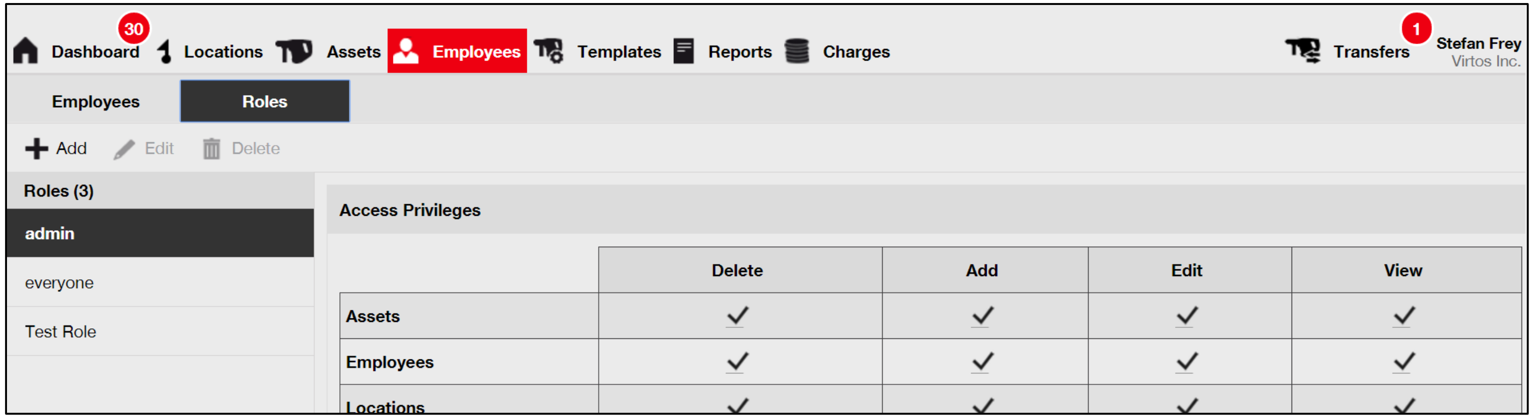
Work steps

1. Click on Employees in menu bar
2. Click on 'Roles'
3. Define basic authorization by Assets, Employees, Locations and Templates
4. Add additional privileges in lower menu area

Important to know

- Location types can be
  - Container
  - Jobsite
  - Location Group
  - Vehicle
  - Warehouse
- Recommendation is to have a location for 'Retired assets' (which can't be deleted)

Screen shot



6.2 EMPLOYEES – ADD NEW EMPLOYEES

Employees use ON!Track to transfer and edit assets or to manage warehouses.
Here is outlined how to set up employees.

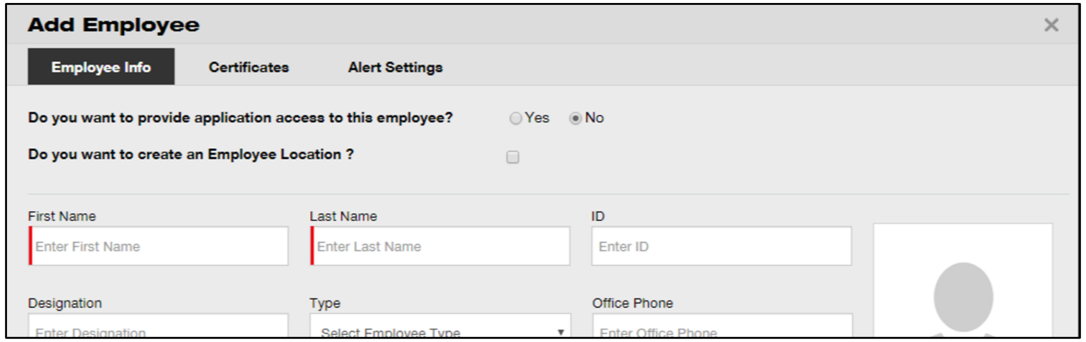
Work steps

1. Click on **Employees** in the main-navigation bar.
2. Click on the **Plus icon (“Add”)**
3. Fill out the **data required** on Employee Info tab; Click on **Save and Next** to add Certificates.
4. Select and add **Certificates required**
5. Click on **Save and Next** set Alerts.
6. Select **email alerts** by ticking the checkboxes
7. Click on **Save and Exit** at bottom of the data entry screen to complete the addition.

Important to know

- Mandatory fields are marked red, a complete data entry is advised.
- If the checkboxes are grayed-out it means that currently, email alerts are turned off. Contact your administrator to enable delivery of alerts via email.)
- In order to add Certificates on this screen, they must have been previously added to ON!Track; you can add Certificates under main-navigation point Templates.

Screen shot



6.3 EMPLOYEES – EDIT AN EMPLOYEE

Employee data can be edited which is described in this scenario.

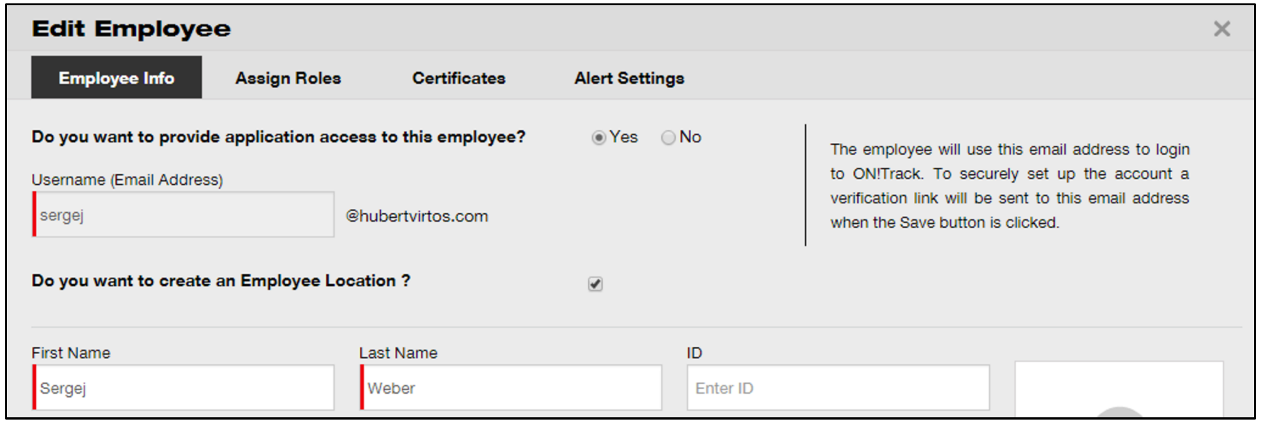
Work steps

1. Click on **Employees** in the main-navigation bar.
2. Select the **employee to be edited** with checkbox.
3. Click on the **Pencil icon ("Edit")**.
4. Navigate to the **respective tab (Employee Info, Assign Roles, etc.)** where editing is required and edit data accordingly.
5. Click on **Save and Exit** at bottom of the editing screen to complete editing the employee.

Important to know

- Mandatory fields are marked red, a complete data entry is advised.

Screen shot



6.4 EMPLOYEES – DELETE AN EMPLOYEE

In case an employee is not needed in ON!Track anymore it can be deleted.

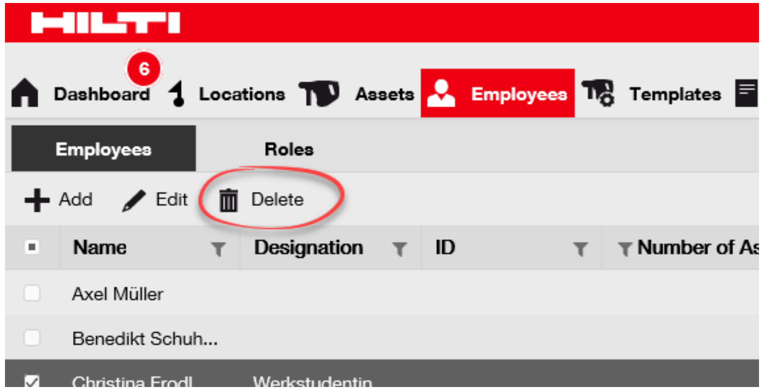
Work steps

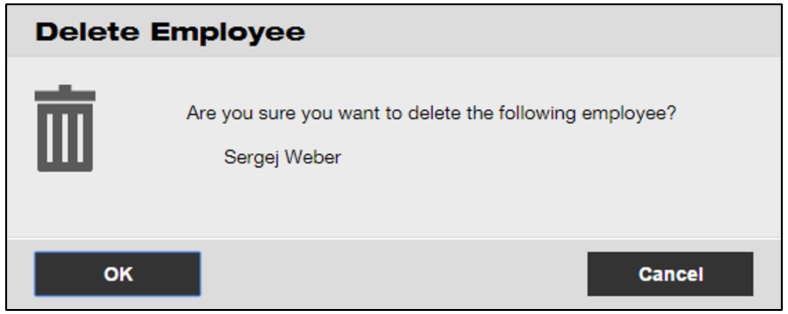
1. Click on **Employees** in the main-navigation bar.
2. Select the **employee to be deleted** by ticking the respective checkbox.
3. Click on the **Trashcan icon (“Delete”)** to delete the selected employee; a confirmation screen opens on-click.
4. Click on **OK** to delete the respective employee permanently; to cancel the deletion, click on Cancel.

Important to know

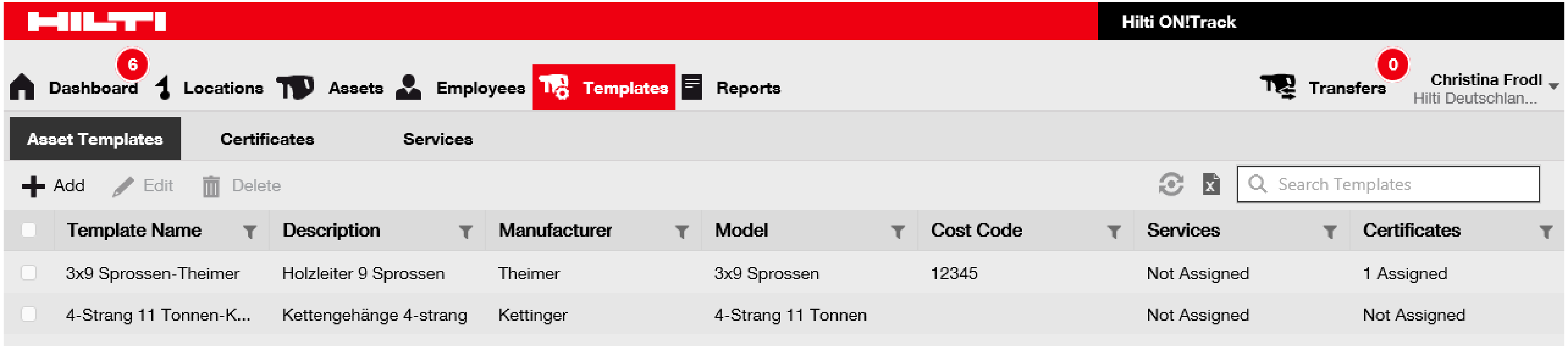
➢ Once deleted, data cannot be restored!

Screen shot





7. TEMPLATES


Hilti ON!Track
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Dashboard
Locations
Assets
Employees
Templates
Reports
Transfers
0
Christina Frodl
Hilti Deutschlan...
Asset Templates
Certificates
Services
Add
Edit
Delete
Search Templates
Template Name
Description
Manufacturer
Model
Cost Code
Services
Certificates
3x9 Sprossen-Theimer
Holzleiter 9 Sprossen
Theimer
3x9 Sprossen
12345
Not Assigned
1 Assigned
4-Strang 11 Tonnen-K...
Kettengehänge 4-strang
Kettinger
4-Strang 11 Tonnen
Not Assigned
Not Assigned

7.1 TEMPLATES – CREATE A NEW TEMPLATE

Locations reflect the structure of the company which can have different types

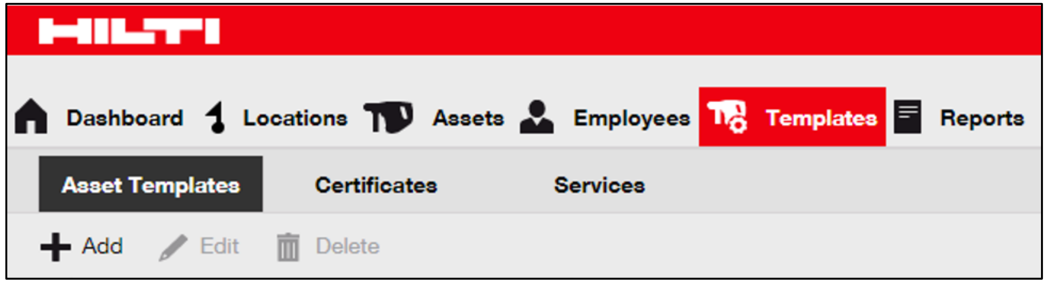
Work steps

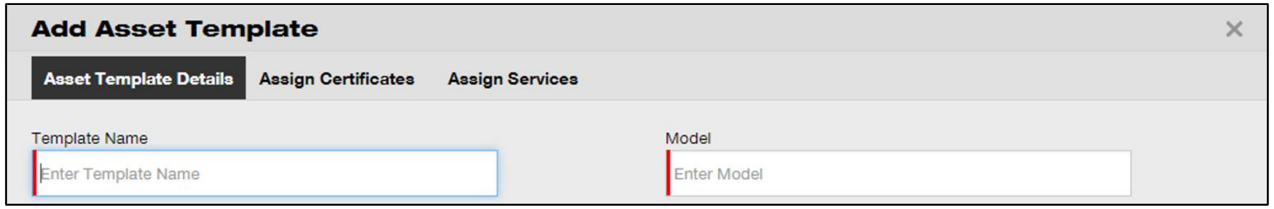
1. Click on **Templates** in the main-navigation bar.
2. Click on the **Plus icon (“Add”)**
3. Fill out the **data required**.
4. Click on **Save and Next**.
5. Select and add **Certificates required**.
6. Click on **Save and Next** to proceed Assign Services.
7. Select and add **Services required.**
8. Click **Save and Exit.**

Important to know

- Mandatory fields are marked in red.
- In order to add Certificates on this screen, they must have been previously added to ON!Track; you can add Certificates in the Certificates tab at the main-navigation point Templates.
- In order to add Services on this screen, they must have been previously added to ON!Track; you can add Services in the Services tab under main-navigation point Templates.

Screen shot





7.2 TEMPLATES – EDIT A TEMPLATE

Locations reflect the structure of the company which can have different types.

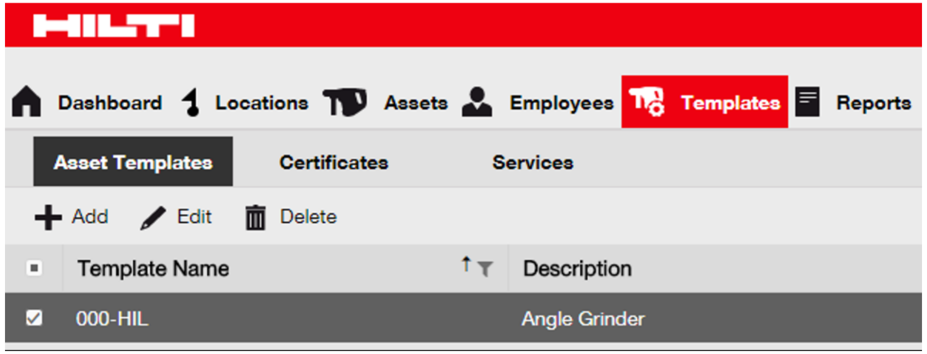
Work steps

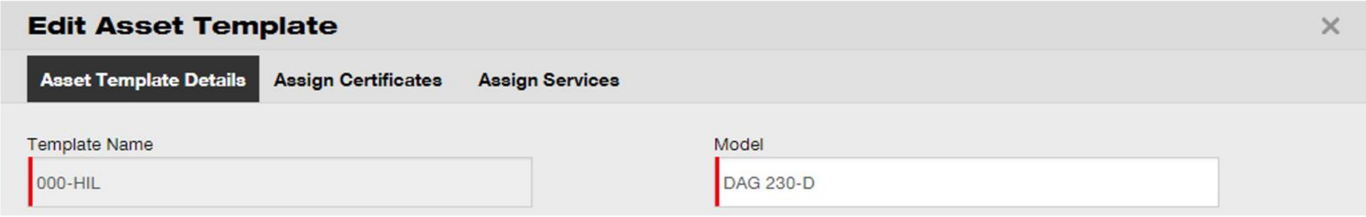
1. Click on **Templates**
2. Select the **template to be edited** with checkbox.
3. Click on **Edit** to edit the selected template.
4. Navigate to the **respective tab (i.e. Asset Template Details, Assign Certificates, Assign Services)**
5. Click on **Save and Exit** at bottom of the editing screen to complete editing the asset.

Important to know

- Mandatory fields are marked red, a complete data entry is advised.

Screen shot





7.3 TEMPLATES – DELETE A TEMPLATE

Locations reflect the structure of the company which can have different types

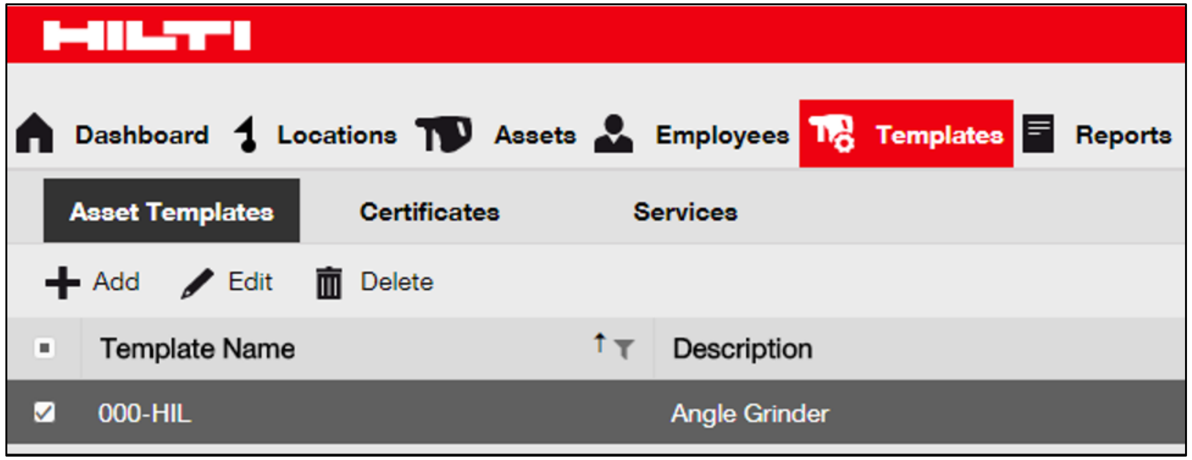
Work steps

1. Click on **Templates** in the main-navigation bar.
2. Select the **template to be deleted** by ticking the respective checkbox.
3. Click on the **Trashcan icon ("Delete")** to delete the selected template.
4. Click on **Yes** to delete the respective template permanently; to cancel the deletion, click on No.

Important to know

- Once deleted, data cannot be restored!

Screen shot



8. SERVICES


Hilti ON!Track
Dashboard
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Locations
Assets
Employees
Templates
Reports
Transfers
0
Christina Frodl
Hilti Deutschlan...
Asset Templates
Certificates
Services
Add
Edit
Delete
Search Templates
Name
Attachments
Receive Notification?
Interval
DGUV-3 (Elektronische Überprüfung
No
Yes, 2 Weeks In advance
Every 1 Years

8.1 SERVICES – ADD A NEW SERVICE

Services are useful to enhance the maintenance of assets.

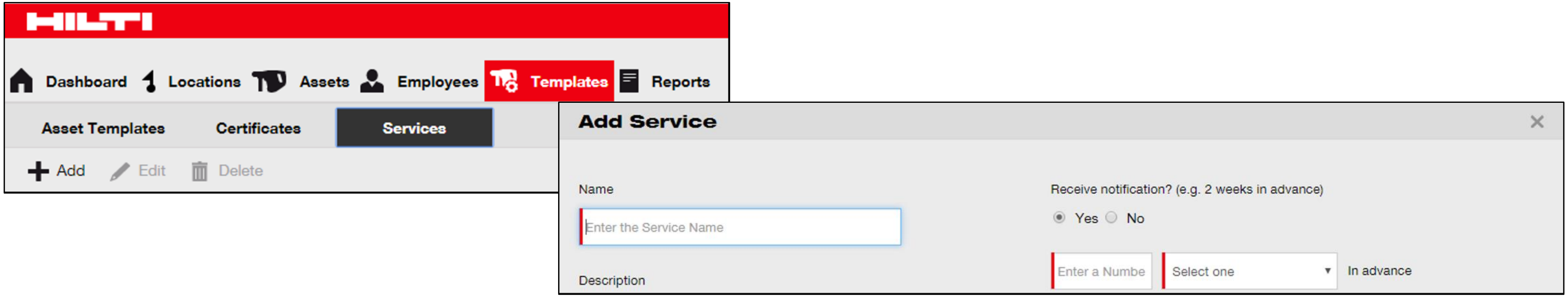
Work steps

1. Click on **Templates** in the main-navigation bar.
2. Select the **Services tab** in the sub-navigation bar.
3. Click on the **Plus icon (“Add”)** to add a new service.
4. Fill out the **data required**.
5. Click on **Add** at bottom of the data entry screen to complete the addition of a new certificate.

Important to know

- ➢ mandatory fields are marked red, a complete data entry is advised

Screen shot



8.2 SERVICES – EDIT A SERVICE

Services support the proper maintenance of assets. They can be edited as shown in this scenario.

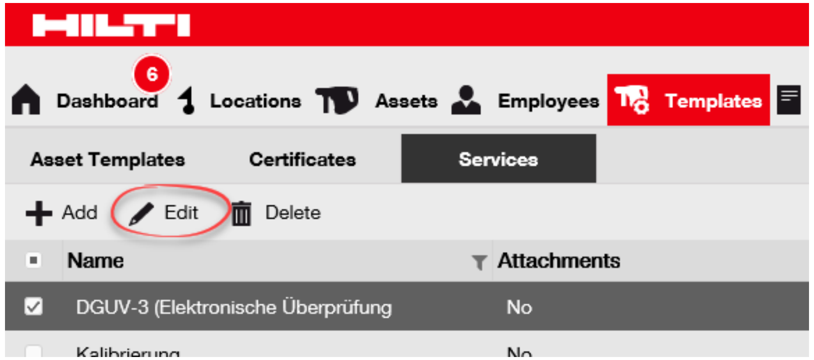
Work steps

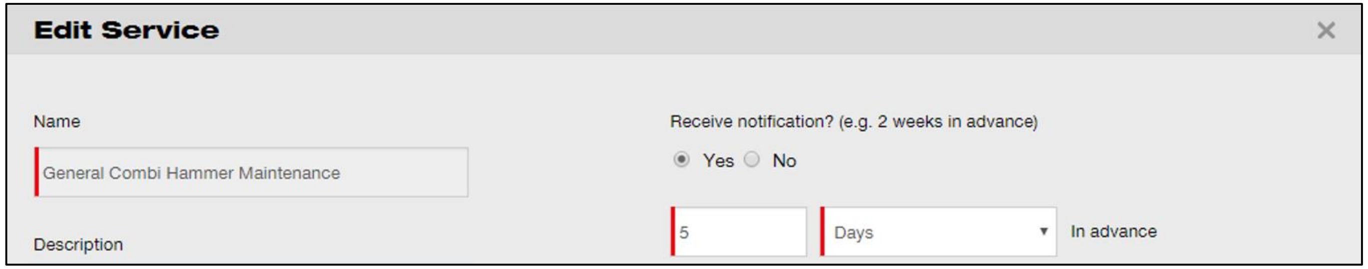
1. Click on **Templates** in the main-navigation bar.
2. Select the **Services tab** in the sub-navigation bar.
3. Select the **service to be edited** with checkbox.
4. Click on the **Pencil icon ("Edit")** to edit the selected service.
5. Edit **service data** accordingly; Click on **Save** at bottom of the editing screen to complete editing the service.

Important to know

- Mandatory fields are marked red, a complete data entry is advised.

Screen shot





8.3 SERVICES – DELETE A SERVICE

Once a service is not valid anymore, it can be deleted.

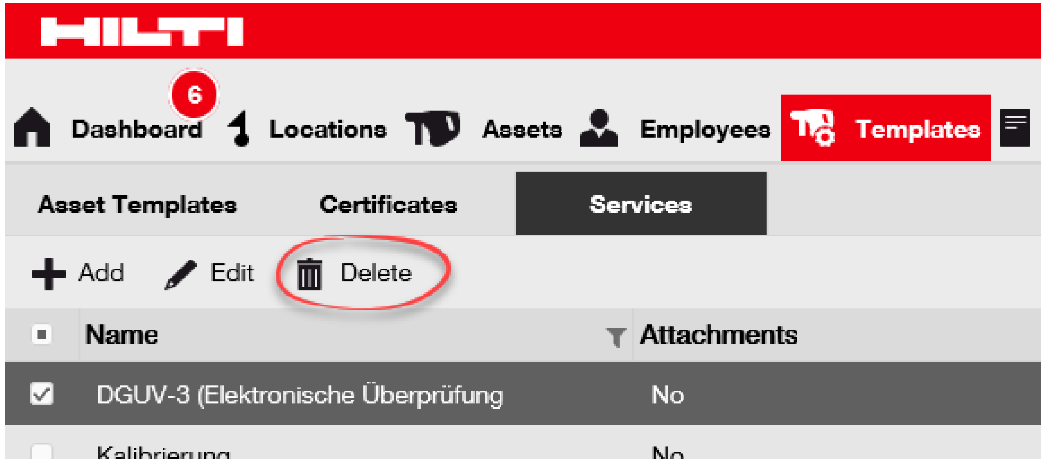
Work steps

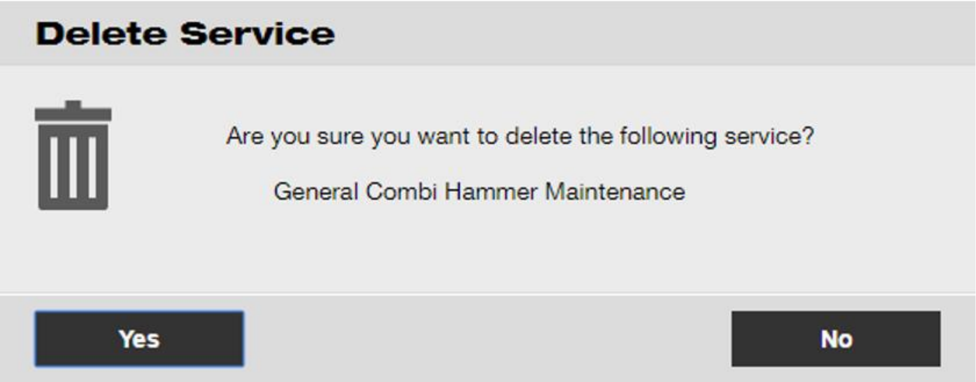
1. Click on **Templates** in the main-navigation bar.
2. Select the **Services tab** in the sub-navigation bar.
3. Select the **service to be deleted** with checkbox.
4. Click on the **Trashcan icon ("Delete")** to delete the selected service
5. Click on **Yes** to delete the respective service permanently; to cancel the deletion, click on No.

Important to know

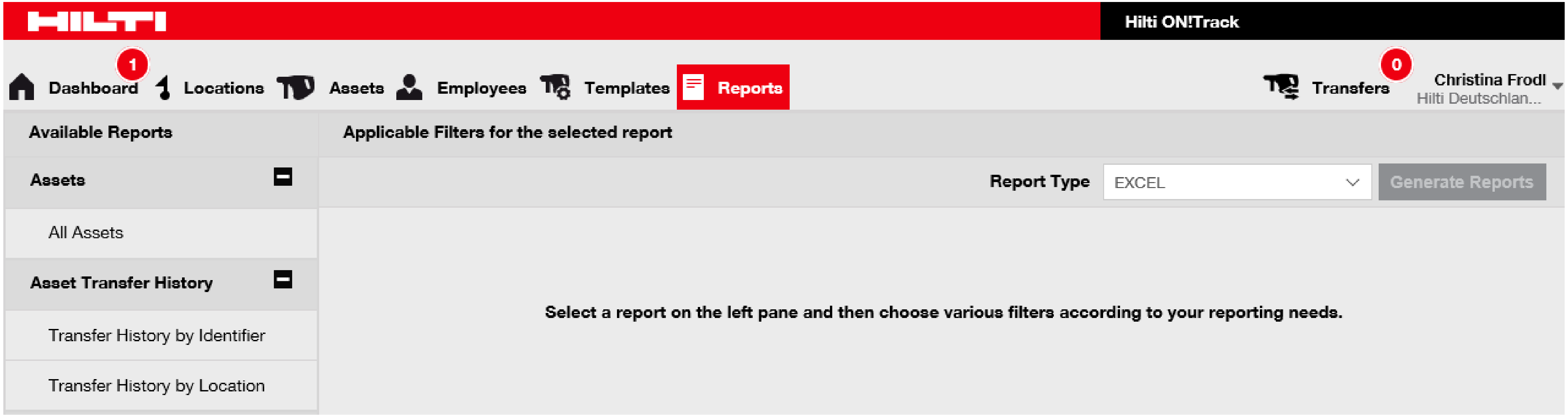
➢ Once deleted, data cannot be restored!

Screen shot





9. REPORTS


Hilti ON!Track
1
Dashboard
Locations
Assets
Employees
Templates
Reports
0
Transfers
Christina Frodl
Hilti Deutschlan...
Available Reports
Applicable Filters for the selected report
Assets
All Assets
Asset Transfer History
Transfer History by Identifier
Transfer History by Location
Report Type
EXCEL
Generate Reports
Select a report on the left pane and then choose various filters according to your reporting needs.

9.1 REPORTS – OVERVIEW

Reports help to increase efficiency by summarizing the current situation of your assets.

Work steps

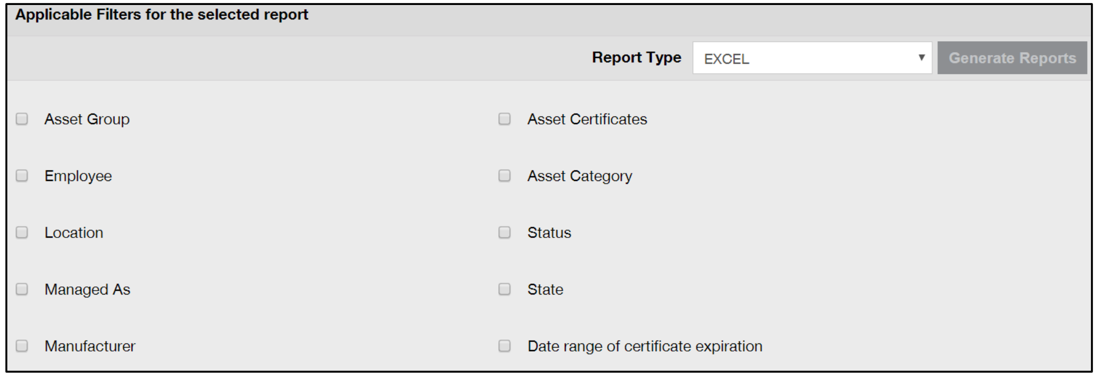
Reports are available for the following dimensions:

- All assets
- Asset Transfer History
- Certificates
- Services
- Employees
- Hilti Asset Data

Important to know

➢ Report fields have to be ticket and selected; then report generation is possible.

Screen shot

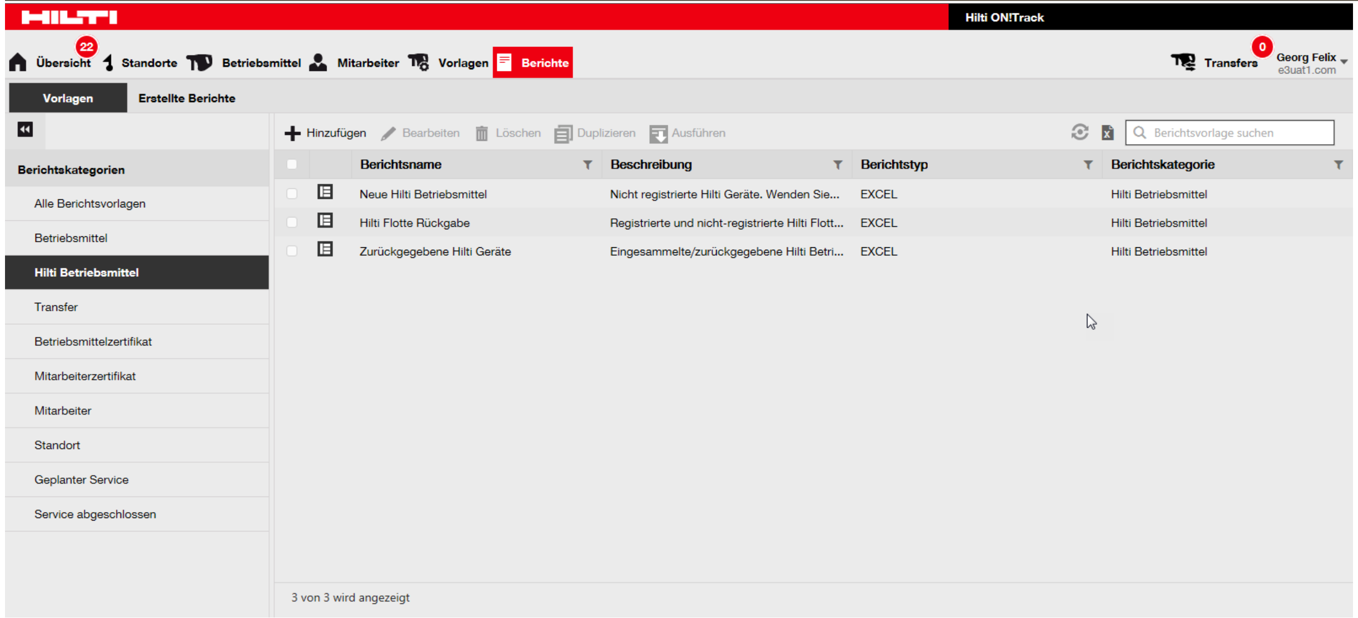


9.2 REPORTS – REPORT TEMPLATE I

Important to know

- New Hilti assets: The intention of the report template is to check whether your new Hilti devices are already registered via the serial number in ON!Track.
- Hilti fleet return: This report template provides an overview, which fleet devices expire and should be returned to Hilti.
- Returned Hilti devices: This report template outlines which Hilti devices have already been returned to Hilti.

Screen shot

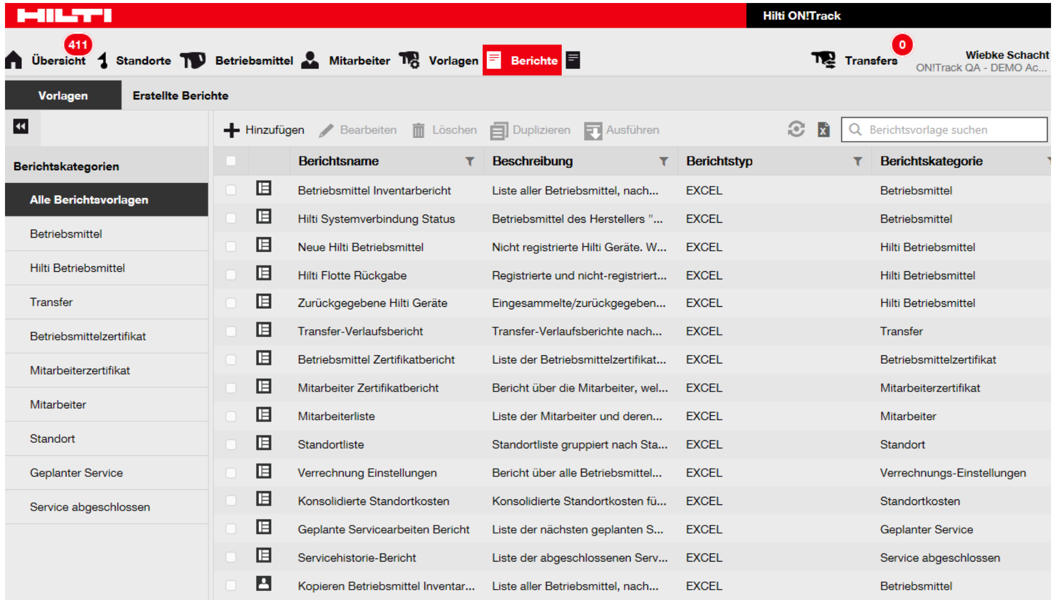


9.3 REPORTS – REPORT TEMPLATE II

Important to know

- Under the tab “report” it is now possible, to select among the prestored report templates or to create a new report.
- This symbol indicates that this is a predefined template. This cannot be edited or deleted.
- This symbol indicates that this is a user-defined report. This can be edited and also deleted.

Screen shot

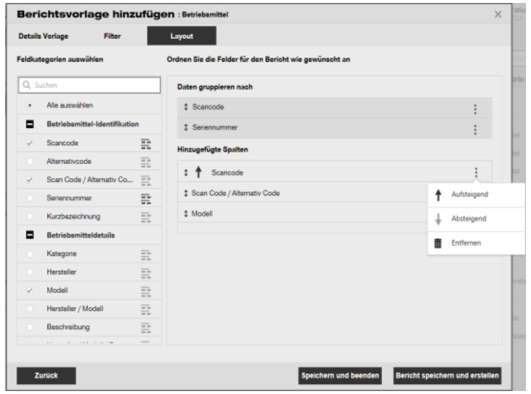


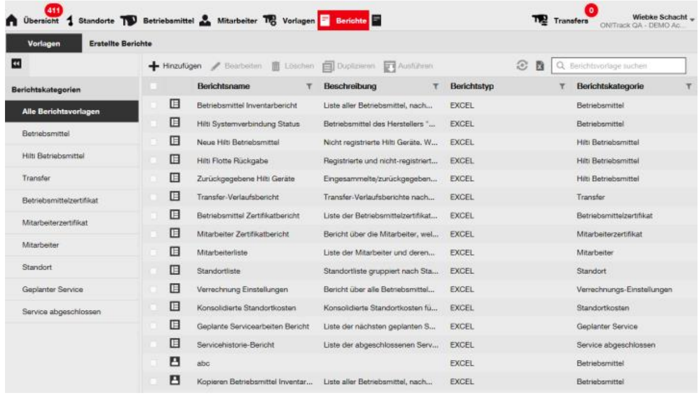
9.4 REPORTS – REPORT TEMPLATE III

Work steps

1. Click on “add” to create a new user-defined template.
2. At this point, the red marked fields have to be filled with the necessary details and subsequently click on “next”.
3. Here the filters can be selected. You can either select all asset categories or individual filters (to generate a more detailed report).
4. After selecting the filters, click on “next” to proceed to the next step.
5. The column category can be defined in the tab “layout”.
6. By clicking and thus selecting the check box of the field categories, the category appears under “added columns” and can be arranged by the “drag and drop” logic according to individual needs.
7. By clicking on the icon in the selection of the field categories (by clicking on, the icon appears dark grey), it is possible to group the data.
8. By clicking on the icon, it is defined whether the data should be displayed in an ascending or descending order.
9. Subsequently the report can be saved and created. Report appears in the template overview.

Screen shot



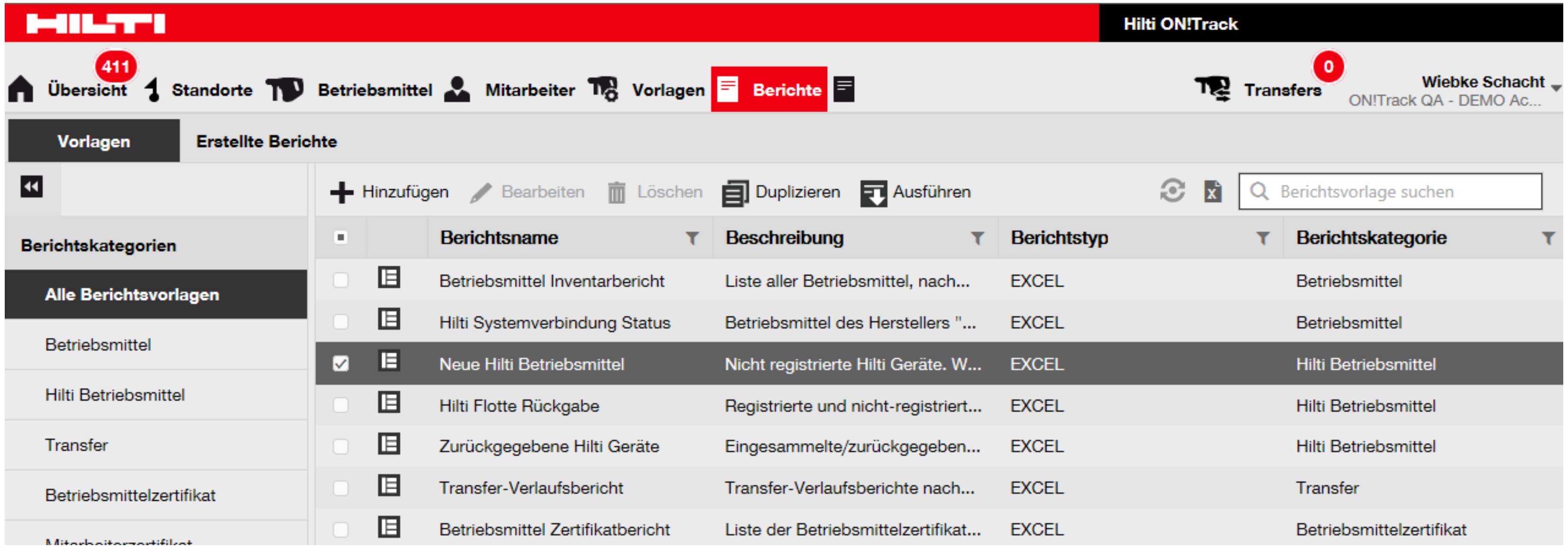


9.5 REPORTS – RUN REPORTS

Work steps

1. To run a report, click on the tab “reports”.
2. To run a report, select the desired report and click on “run”.

Screen shot



9.6 REPORTS – CREATE REPORTS

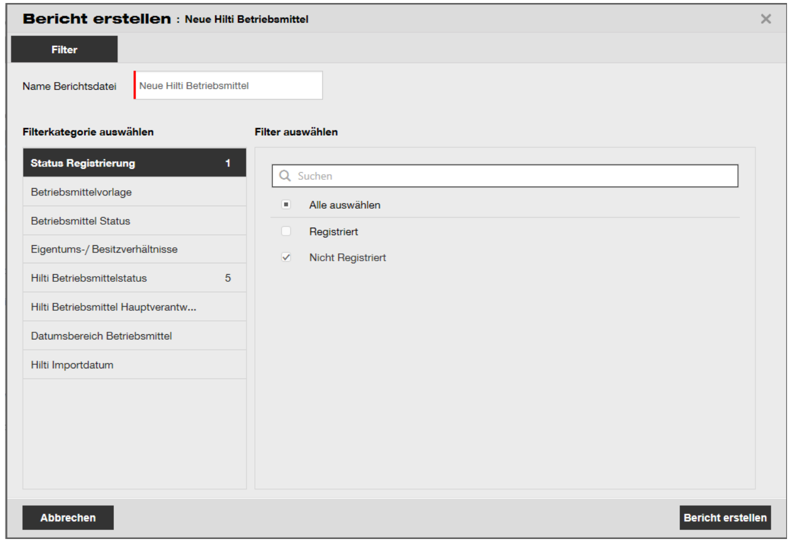
Work steps

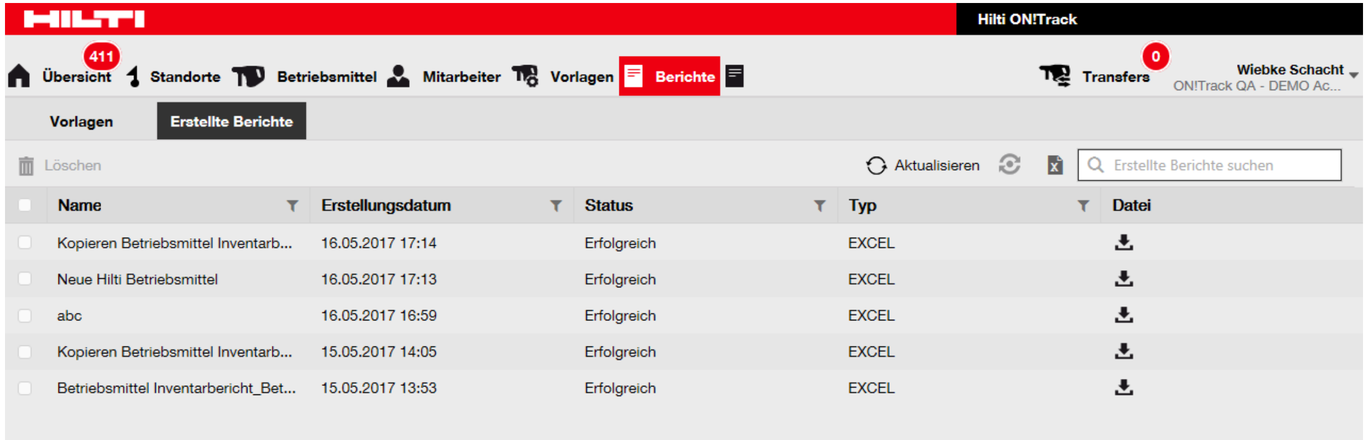
1. Here you can define further individual filter categories in the respective report template before the report is generated.
2. Click on the icon “generate report” to generate a report.
3. Click on the icon, to download the report. The report can be downloaded for a period of 7 days.

Important to know

➢ Under the “reports” tab, the reports are stored for a period of 7 days. The most recent report (last generated report) is shown here first in the list.

Screen shot





10.1 IMPORT & EXPORT SETTINGS – ASSIGNMENT

Locations reflect the structure of the company which can have different types

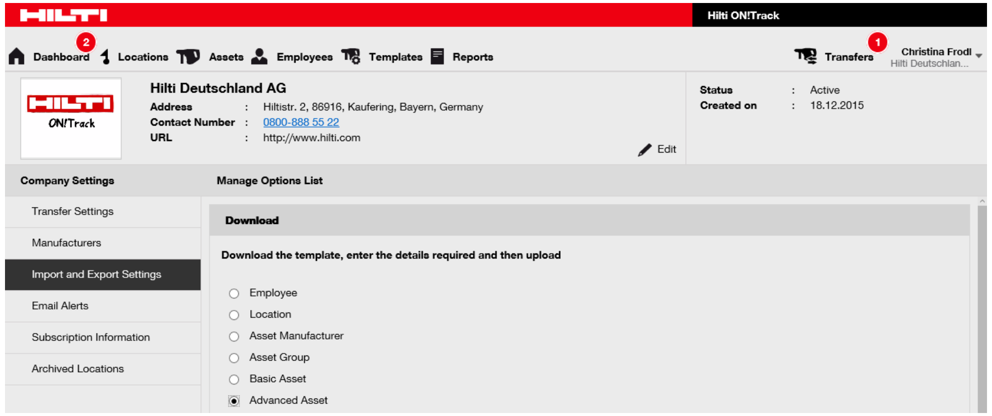
Work steps

1. Click on **your name**
2. Click on **Company Settings**
3. Click on **Import and Export Settings**
4. Click on **Advanced Asset**

Important to know

- Location types can be
  - Container
  - Jobsite
  - Location Group
  - Vehicle
  - Warehouse
- Recommendation is to have a location for 'Retired assets' (which can't be deleted)

Screen shot



10.2 IMPORT & EXPORT SETTINGS – EDIT

Locations reflect the structure of the company which can have different types

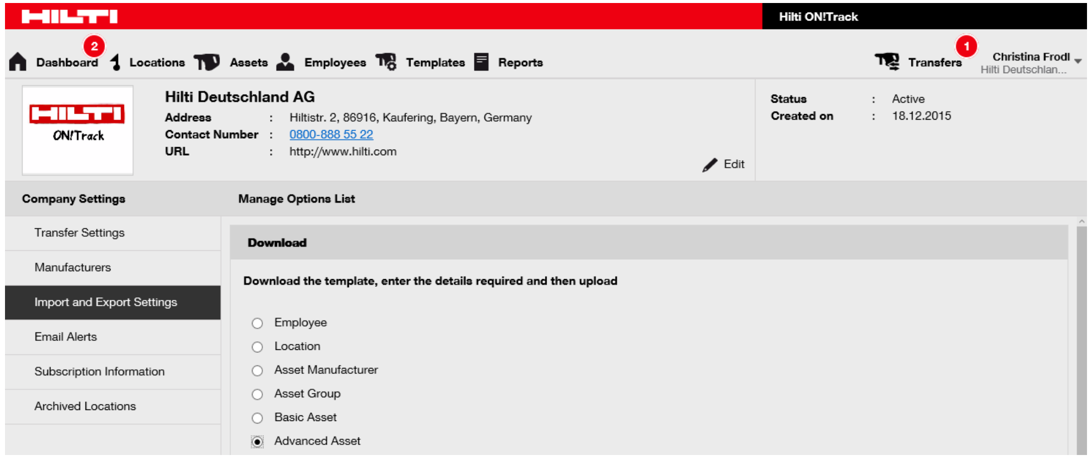
Work steps

1. Click on **your name**
2. Click on **Company Settings**
3. Click on **Import and Export Settings**
4. Click on **Advanced Asset**

Important to know

- Location types can be
  - Container
  - Jobsite
  - Location Group
  - Vehicle
  - Warehouse
- Recommendation is to have a location for 'Retired assets' (which can't be deleted)

Screen shot



10.3 IMPORT & EXPORT SETTINGS – DELETION

Locations reflect the structure of the company which can have different types

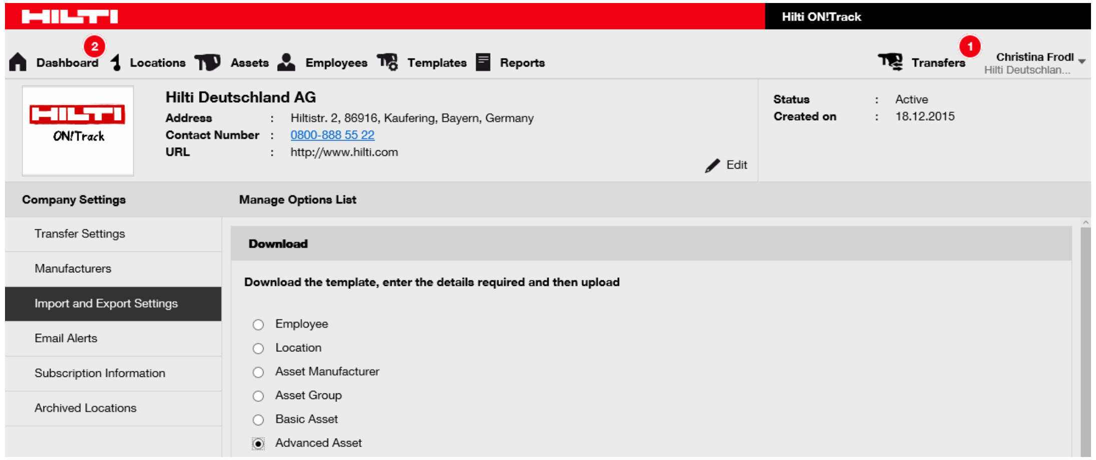
Work steps

1. Click on **your name**
2. Click on **Company Settings**
3. Click on **Import and Export Settings**
4. Click on **Advanced Asset**

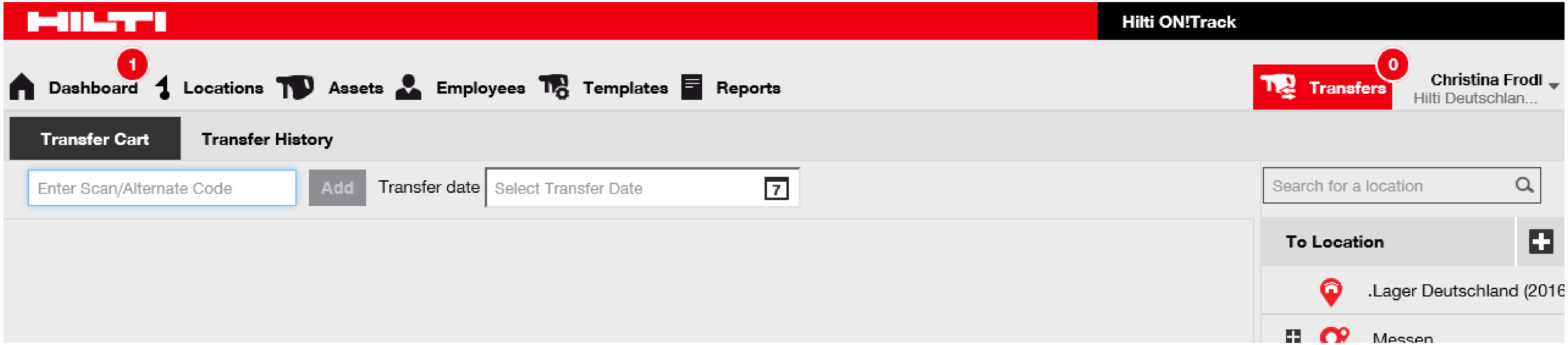
Important to know

- Location types can be
  - Container
  - Jobsite
  - Location Group
  - Vehicle
  - Warehouse
- Recommendation is to have a location for 'Retired assets' (which can't be deleted)

Screen shot



11. TRANSFERS



11.1 TRANSFERS – TRANSFER ASSET TO ANOTHER LOCATION

Assets are used on jobsites or move from one warehouse to another. This scenario outlines the way to transfer to another location.

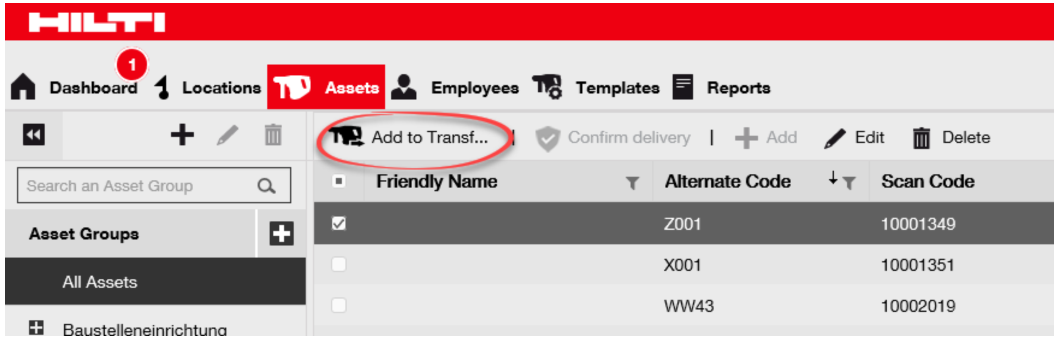
Work steps

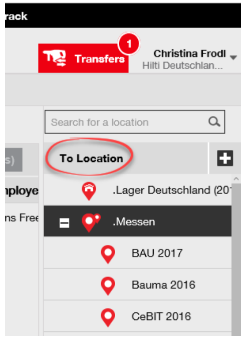
1. Click on **Assets** in the main-navigation bar.
2. Select the **Asset Sub-Group** of the asset.
3. Select the **asset to be transferred** with checkbox.
4. Click on **Add to Transfer Cart.**
5. Click on **Transfers** in the main-navigation bar.
6. Click on the **Plus icon** to expand location structure
7. Select the **Location** the asset has to be transferred to.
8. Click on the **Calendar icon** to pick a return date.
9. Click on **Transfer Asset(s)** and **Confirm**.

Important to know

- All assets that are in the Transfer Cart will be transferred to the same location. For different locations, repeat the process per location.
- The number within the red circle indicates the number of placed assets in the Transfer Cart.

Screen shot





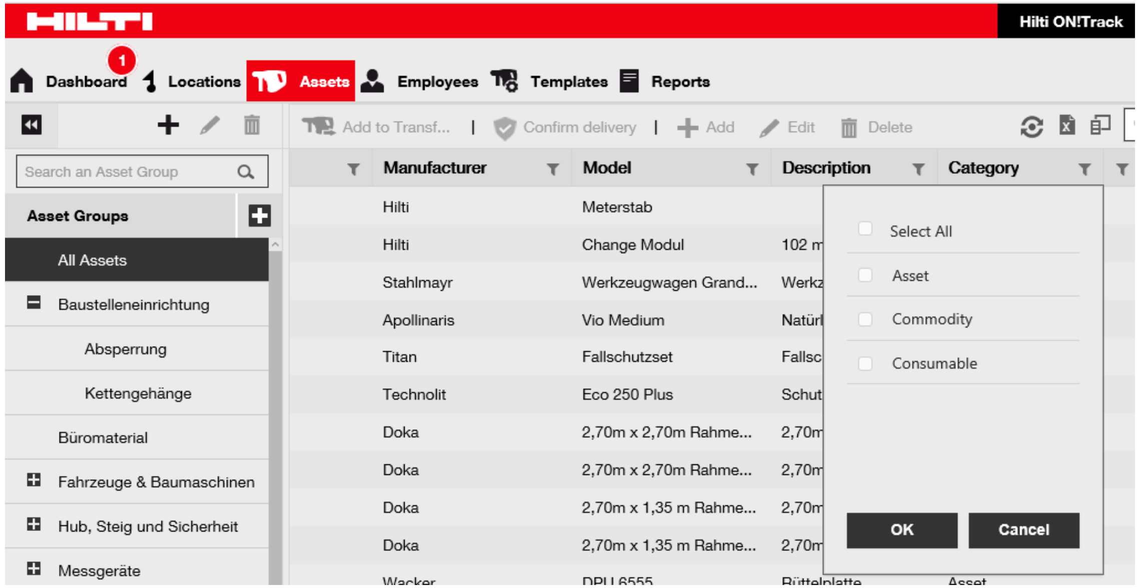
11.2 TRANSFERS – TRANSFER CONSUMABLE

Consumables are used on jobsites or move from one warehouse to another. This scenario outlines the way to transfer to another location.

Work steps

1. Click on **Assets** in the main-navigation bar.
2. Click on **All Assets**
3. Edit the **category** and select **consumable** with a tick
4. Select the **consumable to be transferred** with checkbox.
5. Click on **Add to Transfer Cart.**
6. Click on **Transfers** in the main-navigation bar.
7. Click on the **Plus icon** to expand location structure
8. Select the **Location** the asset has to be transferred to.
9. Click on the **Calendar icon** to pick a return date.
10. Click on **Transfer Asset(s)** and **Confirm**.

Screen shot



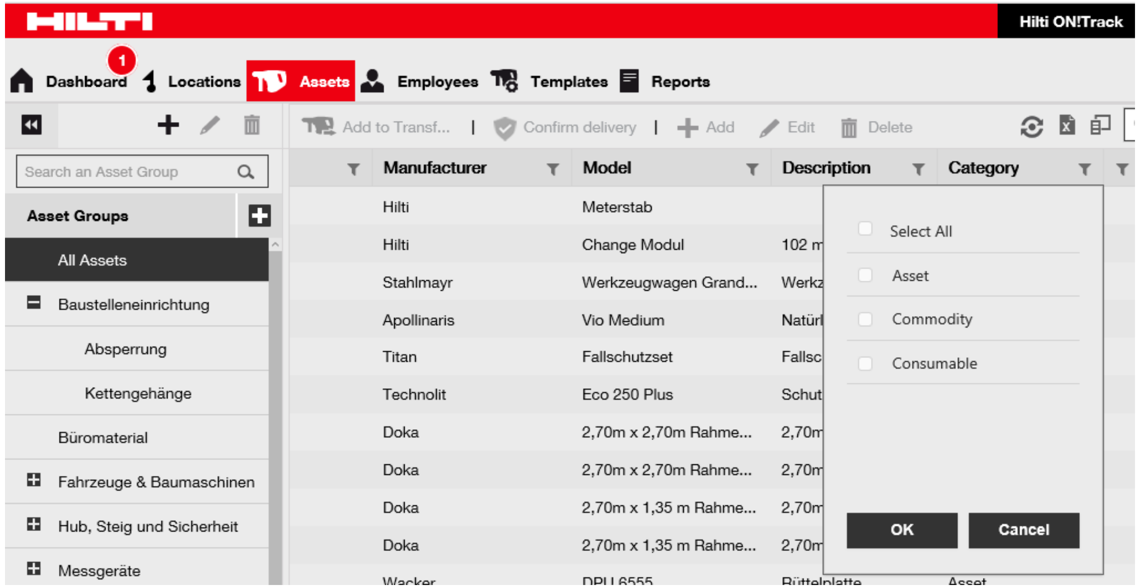
11.3 TRANSFERS – TRANSFER COMMODITY

Commodities are used on jobsites or move from one warehouse to another. This scenario outlines the way to transfer to another location.

Work steps

1. Click on **Assets** in the main-navigation bar.
2. Click on **All Assets**
3. Edit the **category** and select **commodity** with a tick
4. Select the **commodity to be transferred** with checkbox.
5. Click on **Add to Transfer Cart.**
6. Click on **Transfers** in the main-navigation bar.
7. Click on the **Plus icon** to expand location structure
8. Select the **Location** the asset has to be transferred to.
9. Click on the **Calendar icon** to pick a return date.
10. Click on **Transfer Asset(s)** and **Confirm**.

Screen shot



11.4 TRANSFERS – SEARCH FOR A TRANSFERRED ASSET

Once transferred assets could be search for their current location. Transfer history shows the various transfers of an asset.

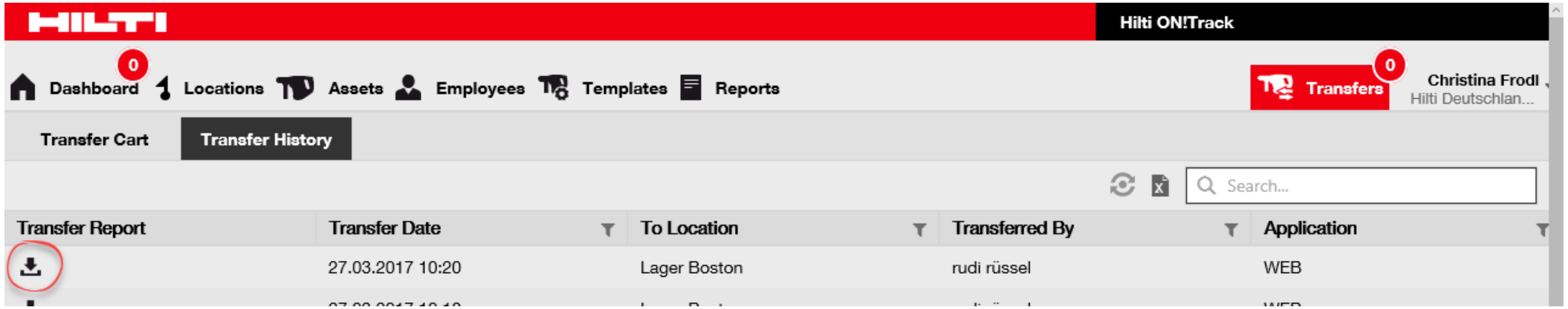
Work steps

1. Click on **Transfers** in the main-navigation bar
2. Click on **Transfer History**
3. Select the **relevant asset** to get the information you are looking for
4. Click on the **Transfer Report**
5. The report opens in Adobe Reader and the information is listed

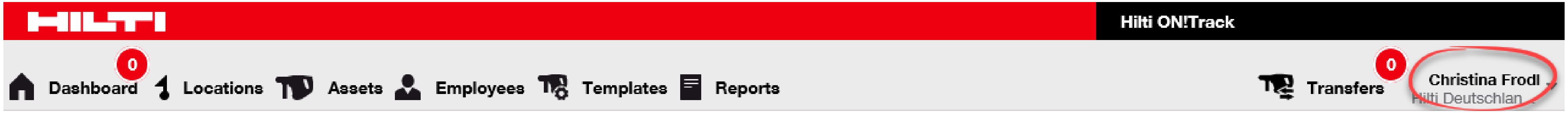
Important to know

- Location types can be
  - Container
  - Jobsite
  - Location Group
  - Vehicle
  - Warehouse

Screen shot



12. USER SETTINGS

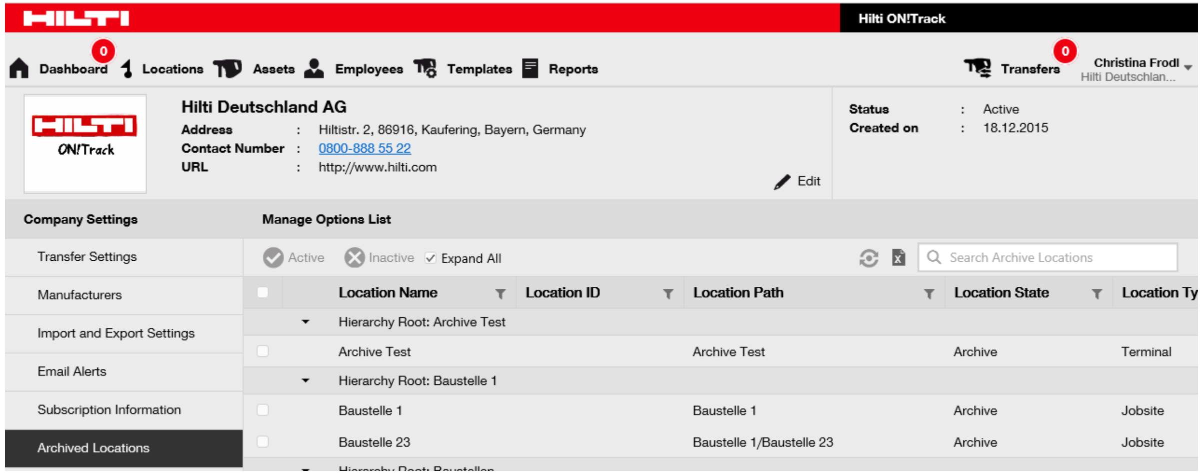


12.1 USER SETTINGS – COMPANY SETTINGS
12.1.1 TRANSFER SETTINGS, MANUFACTURERS, ARCHIVED LOCATIONS

Work steps

1. Click on **your name** in the main-navigation bar
2. Click on the **Company Settings**
3. Click on **transfer settings, manufacturers or archived locations** to get the information you are searching for

Screen shot



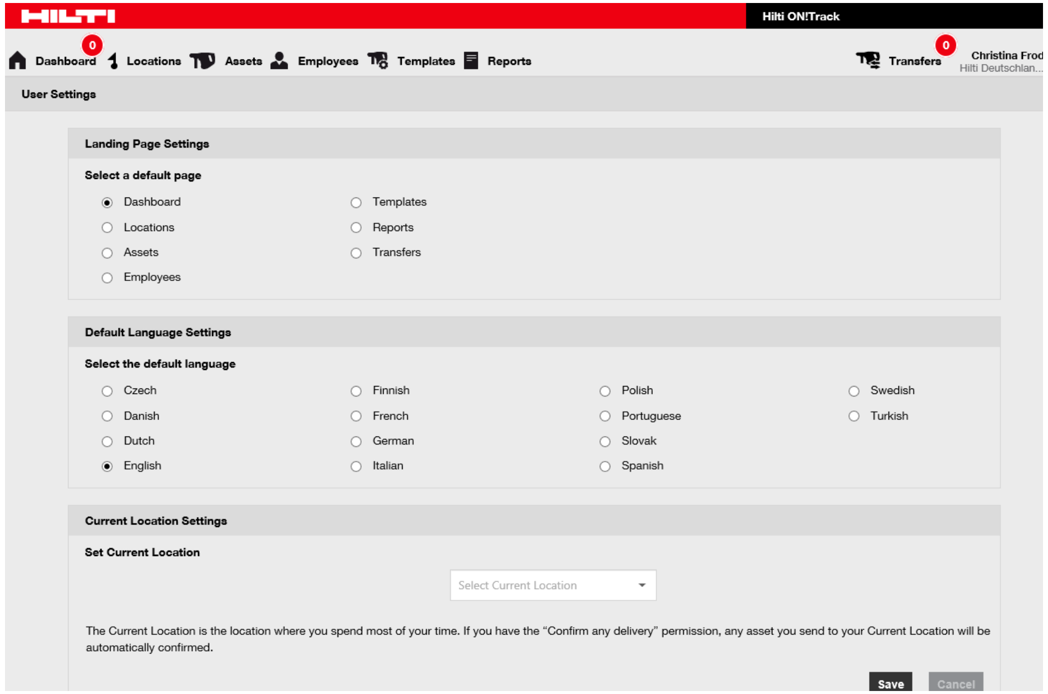
12.2 USER SETTINGS – USER SETTINGS
12.2.1 PAGE & LANGUAGE SETTINGS

To change the default page or the language

Work steps

1. Click on **your name**
2. Click on **User Settings**

Screen shot

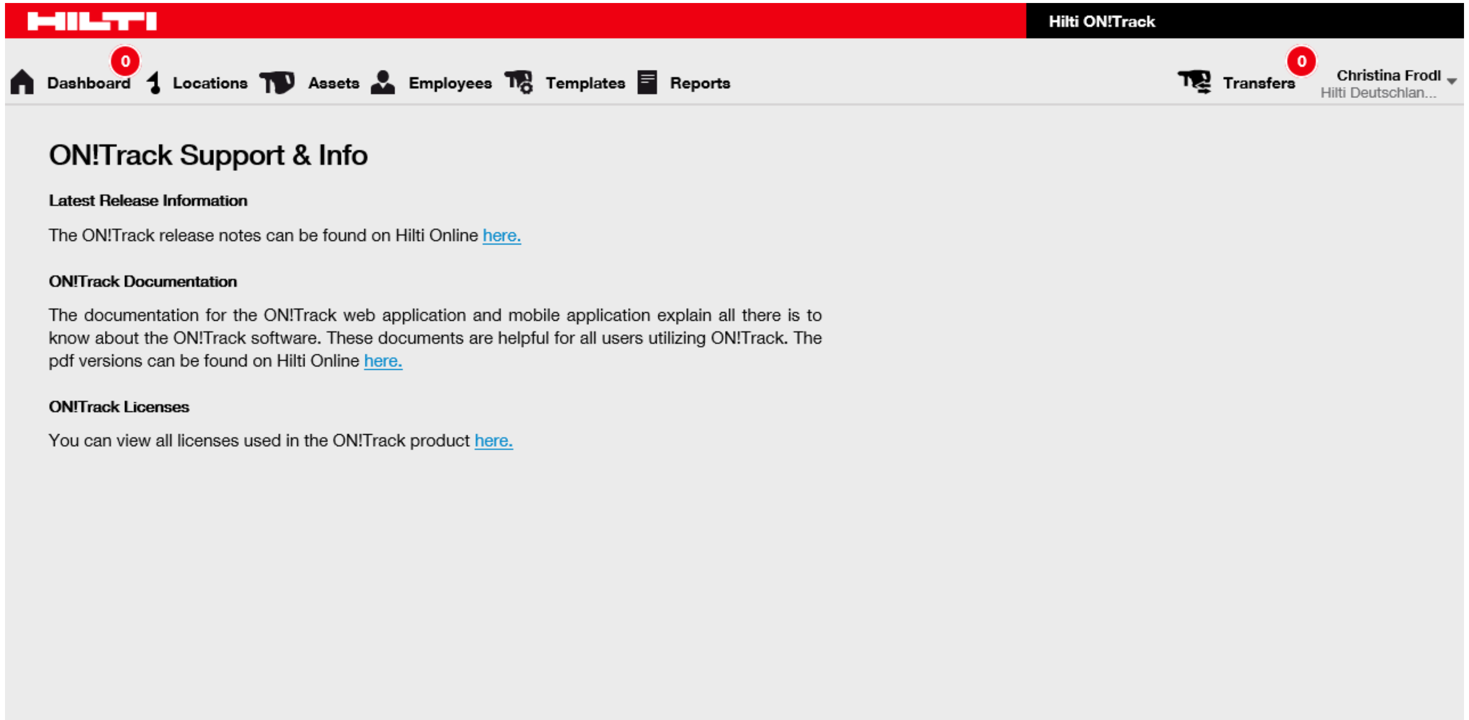


12.3 USER SETTINGS – SUPPORT & INFO

Work steps

1. Click on **your name**
2. Click on **Support & Info**

Screen shot



12.4 USER SETTINGS – LOG OUT

Work steps

1. Click on **your name**
2. Click on **Log Out**

Important to know

- It is safer, if you log out yourself

Screen shot