

Objektverwaltung

The item management contains items and inventories, which does not have own locating hardware, but should be display on maps. This could be container, construction equipments, aso.

Inhaltsverzeichnis

- Overview
 - What do i use the item management for?
 - Common basics of the module
 - Requirements
- Functions of Item management
 - Item Management
 - Create new item
 - Inspect item
 - Edit item
 - Copy item
 - Delete item
 - Item groups
 - Edit group
 - Delete group
 - Activities
 - Filter
 - Create new activity
 - Activity related actions
 - Profiles & Profile groups
 - Profile groups
 - Profiles

Overview

What do i use the item management for?

In the module "Item management" you can access your items and group them. Furthermore you can get an overview about the history, or the whole "life" of your items, you can add entries or revise them. Under the tab profiles you organize the structur of your items.

Users having access to the item management on their displays, can change there item data (if these are marked as changeable). For instance a driver can set the status "loaded" and it will be send to the Yellowfox portal and all other displays with enabled item management.

Common basics of the module

Items where described with profiles. These contains fields of different data types, which can be set with values. These profiles are grouped and maintained in profile classes. The profile class "object types" is a special one, with the highest priority.

Neither in profile definition nor in assigning to profile classes are restricted. You are free to set it up to your own ideas or business cases.

Requirements


The access to item management can be booked as option. From this point of time on you can grant access to item management and to activities to each of your users in several right levels.




Functions of Item management

Item Management

The Item management lists all the items of your company in a table. You can search and filter this list by items, item groups or assigned profiles.

Buttons:

	<i>Reload table</i>	reload the table and refresh the contents
---	---------------------	---

	<i>Create new item</i>	opens the assistant guides you through all steps to create a new item
	<i>Assign selected items to a group</i>	assigns all selected items to a group
	<i>Delete selected items</i>	deletes all selected items

Create new item

An assistant guides you through all necessary steps to create a new item. You can go back to each page if you want to change some data before you store your new item. All entered data are kept, as far as possible, while changing your data.

Inspect item

With this function you can get an overview about all data of this item. Furthermore you can see the latest location on map, if it is set and switch to edit mode directly. About the tab activities you can see the latest 15 activities of this item and switch to activity enquiries from there.

Edit item

You can change all data of your item, You can also change activity related data here, but you cannot set additional data as driver information or similar. Please use this function to maintain your master data or standing data and use the functions in tab "Activities" to add, edit or revise your activities.

Copy item




With this function you can create a new item as a copy of the selected one. You are guided by an assistant through all steps, same when creating new items, but all data are set already, but you can change and edit as you need.

Delete item

You can delete an item. It's activities stay untouched and are not deleted.

Item groups

Item groups are used to organize your items by building logical units or groups. One item can be member of several groups, as a regional group "East", as well as a data driven group "red container". The table item objects list all your groups and the assigned items. You can filter this list by group names or group members, means items.

Buttons:		
	<i>Reload table</i>	reload the table and refresh the contents
	<i>Create new item group</i>	opens a window there you can setup a new group and already assign member items
	<i>Delete selected item groups</i>	all selected groups are being deleted

Edit group

You can change the name of the group and add or remove member items



Delete group

This function is used to delete a item group. If this group has still member items you can remove this assignment or add all these items as members of another group. All other assignments of groups and items stay untouched.

Activities

At this page you get an overview about all the activities of your items. You can literally view there whole "life". Please be aware that just entries are listed, which have changes in data related to activity data. This means changes in standing data does not influence this list. The icons of each activity shows the current state according to the profile and item configuration. When the entry is created by an order, these is linked too and you can view all order data from there.

Activities written in *italic* font mark the most current activity entry of each item, additionally the duration is starting with the word "since ..".

Buttons:		
	Load Data	trigger reload of table, after you changed filter or you want to reload
	Configure table columns	You can configure your table and show or hide columns according to your needs

Filter

Time Range

You can filter your data by using preset data ranges, for instance to view the last 7 days. In addition you can choose your own range by using the calendar fields. The first calendar date is the date when you start using item management, in maximum 2 years back. The latest usable date is today.

Report By

You can filter your entries by vehicles, drivers and items. These filter are adding each other. This means, if you choose vehicle A and driver B you will get all activities send by driver B while using vehicle A.

Item field

You can filter by specific data of your items. First you choose a profile or item type. Then you get a list of datatypes belonging to them and according to this one, you choose your filter criteria. For a numeric field it could be "<", "<=", "=", ">=" oder ">". In this way you can filter by all items having the color "red" (if there is a detail "color", and you are using it).

Load data

This button triggers the reload of your table using the filter criteria you setup.

Create new activity

You can create new activities for your items. In this way you can setup entries, if setting it from display failed or has been forgotten to set by driver. The first possible date depends on date of creation of the item in the portal. You also can set up a driver and a vehicle, to assign them to this activity.

If you used the item filter above, the item field is already filled. Otherwise you can choose it from the list. As soon you choose the date for the activity the item details are loaded and already set with the data are valid to this point of time. So you keep all data and change only the necessary one.

Activity related actions

Show on map

If there are location data available for this activity, you can show it on the map.

Edit activity

You can edit or revise activities. A Revised activity is no new activities, it just replace the revised one. So you can adjust wrong timestamps from display or wrong bookings.

Delete activity

Deletes this activity

Show order details

If an activity is linked to an order, and data are booked in relation to this, you can get an overview about the order here and all bookings according to it.

Show history

The history contains all changes and revisions to an item entry. It should answer the question: Who set this entry, at what time?"

Profiles & Profile groups



Profile groups are at Yellowfox the highest level in item hierarchy. They define what a profile is used for. There is already the group "item types", grouping all profiles which describe item types as "container", "construction machines" or "vehicles". Furthermore there are the profile groups for additions. These can be splitted in several logical groups. You refind this order in the item editor, where each group is shown in an own page.

Profiles are the basic structur of your items. In profiles you define the data, representing your item. Each profile can contain as much detail fields as you need. These can be of different data types. Currently following types are possible:

Data type	Content	Options	Example
List	a list of values		state -> "Loaded", "Set up", "Ready for loading"
Yes/No	boolean values		Full -> "Yes", "No"
Text	free text		checked by -> "F. Smith"
Integer	integer (no floating points)	data unit	weight -> "5", unit -> "lb"
Floating point	floating point with up to 4 decimal places	data unit, decimal places	weight -> "5.5", unit -> "lb", decimals -> "3"
Date	date		next check -> "01.06.2018"
Time	time		pause to -> "13:00"
Date/Time	date and time		last check -> "01.06.2018 16:24"

Profile groups

On this page you can get an overview about all your group levels, profile groups and the assigned profiles, as well as the amount of items using the profile.

Buttons:		
	New profile group	create a new profile group
	Reorder profile groups	change the order of your profile groups

New profile group

You can create new profile groups, by giving an unique description and defining a group level. You can choose between setting it to a new level or add it to an existing one, for instance "item types". In the table below you see the current order within this level and can reorder by drag and drop the symbol. Your current group is highlighted in "**black**".

Reorder profile groups

With this function you can change the order of all your groups and move them between levels.

Edit profile group


You can use this function to change the group name or move it to another level. In the table below you see the current order within this level and can reorder by drag and drop the symbol. Your current group is highlighted in "**black**".


Delete profile group

If your group still contains profiles you can move them to another one before deleting the group. Deleting a profile group cannot be undone.

Profiles

On this page you get an overview about all your profiles and the assigned items.

Buttons:		
	Create new profile	create a new profile

	Reorder profiles	change the order of the profiles within there groups
---	------------------	--

Create new profile

An assistant guides you through all steps for creating a new profiles. Common data as description and profile data are recorded. Furthermore you define your details, by setting an description and a data type.

According to this, there are additional data necessary you have to set:

- **Mandantory:** These data have to be set for each item
- **Standing data:** Standing data means these data changes almost never, for instance a weight of an item or the color. If you want to change these data, you enter the item editor. On the opposite there are fields generating activities. Usually these are fields as states or (fluid) levels. Each data change of this data is a new activity. You can change these fields in the item editor too, for instance when creating a new item. In this case the current timestamp is used.
- **Show on display:** Maybe you don't want to share financial data from your "lean" profile. Only fields with this flag will be send to display. If you set this flag at no detail in each profile, the whole item is not displayed there.
If the options standing data and show on display are set, you can see them, but not change them there.

Reorder profiles

You can reorder your profiles and order them by relevance. These order is used in item editor for instance. With this function you also can move profiles to another profile group.

Edit profiles

In the profile editor you are guided step by step and can change, delete or revise all data and details of your profile. Data types of already existing details cannot be changed.

Move items

The move items function allows to move all items to another profile. You choose your target and all details of it are loaded. If the target field has the same data type, you can choose which data you want to move to which field in the new profile.

If you have mapped everything you can move all items to the new profile.

Delete profiles

With this function you can delete profiles. If there are still items assigned or using this profile you can move them to a new one in the next step, similiar to the function "Move items"