

Admin User Guide

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CalAmp | FleetOutlook Administrator User Guide

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1 INTRODUCTION TO FLEETOUTLOOK ADMIN

FleetOutlook Admin provides you with the tools to help manage your fleet and improve overall fleet performance. Because it is web-based, you can use it from any computer that is connected to the Internet and supports the system requirements.

This user guide provides all the information you need to manage all of your assets in FleetOutlook Admin. Depending on your user profile, you may not have the appropriate permissions to access all of the features described in this User Guide.

To download the comprehensive FleetOutlook User Guide, select the Support tab within FleetOutlook or FleetOutlook Admin, and then select the User Manuals sub-tab.

1.1 SYSTEM REQUIREMENTS

For optimum performance while working in FleetOutlook, it is recommended that you use a supported browser. Refer to the Supported Browser Requirements Guide for a list of browsers.

Use of unsupported browsers or flash player may cause poor system performance or loss of features. For example, if you see a grey screen instead of the login page, you do not have the correct version of Adobe Flash Player installed.

http://www.calamp.com/references/docs/Browser_req.pdf

1.2 USER NAME, PASSWORD AND SECURITY

A user name and password are required to log into and use FleetOutlook Admin. If you do not have login credentials, please contact your organization's FleetOutlook Administrator or the FleetOutlook Customer Support Team.

You are responsible for maintaining the confidentiality of your user name and password, and you are solely responsible for all activities that occur under your user name and password. You agree to notify CalAmp of any unauthorized use of your user name and password, or any other breach of security related to the Site.

Note: CalAmp is not liable for any loss or damage arising from your failure to safeguard your username and/or password, or to comply with this section.

2 LOGGING IN FLEETOUTLOOK ADMIN

You can access the FleetOutlook Admin application using any supported web browser connected to the Internet. You must have a valid user name and password to login the FleetOutlook application. Your login session stays active until you close the window or sign out.

To Log In FleetOutlook Admin:

1. Open a supported web browser, and then go to <u>www.wrx-us.net</u>.

Customer Login SKYGUARD LOGIN HERE Username:	

Figure 1: FleetOutlook Login Screen

- 2. Enter your Username and Password.
- Click the **Forgot Your Password** link to have a temporary password sent to the email registered with your FleetOutlook user profile.
- 3. Select the **Application** from the drop-down list.
- Your username and password are the same for both FleetOutlook and FleetOutlook Admin.
- 4. Click the **Login** button.
- Depending on the application selected, either the FleetOutlook Dashboard displays or the FleetOutlook Admin screen displays.
- Depending on your user profile, you may not have the appropriate permissions to access all of the features referenced in this User Guide or to FleetOutlook Admin.

3 UNDERSTANDING FLEETOUTLOOK AND FLEETOUTLOOK ADMIN

Use the FleetOutlook application primarily to monitor your fleet, and the FleetOutlook Admin application to manage your fleet's assets. You can run concurrent sessions of FleetOutlook and FleetOutlook Admin in the same web browser window on two separate tabs. This allows for easy navigation between the two applications.

Action	FleetOutlook	FleetOutlook Admin
Create and Manage Groups		Х
Create and Manage Vehicles	*	Х
Create and Manage Assets		Х
Create and Manage Drivers	*	Х
Create and Manage Users		Х
Create and Manage Alerts		Х
Create and Manage Landmarks		Х
Create and Run Reports	Х	
Create and Monitor Dashlets	Х	
Monitor Vehicles and Drivers	Х	
Monitor and Manage Schedules	Х	
Work with Garmin Messages	Х	
Manage and Track Work Orders	Х	

* The Manage Resources tab in FleetOutlook provides the capability to create and edit drivers and edit existing vehicles.

4 OVERVIEW OF FLEETOUTLOOK ADMIN SCREEN

After successful login, the FleetOutlook Admin screen displays. The screen is blank until you select a group from the Enterprise Tree displayed on the left side of the screen.

ai Amp [®] Flee	æ				Devices	Vehicles Assets	Drivers Users	Groups Landma	rks Alerts Supp
Find		Active Inactive							
🗎 DEMO2 Enterprise Group		Filter Find	MIN	v contains	•	Go	Reset		
Reports		MIN	ESN	MDN	Name	Device Model	Interface Profile I	D Device Last Report	er Provisioning Status
🔁 TechConnect									

Figure 2: FleetOutlook Admin Screen

4.1 FLEETOUTLOOK ADMIN TABS



Figure 3: FleetOutlook Admin Tabs

Depending on your user profile, multiple tabs display across the screen. Each tab represents a FleetOutlook Admin module. Most tabs have sub-tabs. For example, select the Drivers tab, and then select the Active tab to see the drivers assigned to vehicles or available for vehicle assignment. To see deactivated drivers, select the Recycle Bin tab.

		Devices	Vehicles	Drivers	Users
Active	Recycle Bin	Schedule Prof	iles		-

Figure 4: FleetOutlook Sub-tabs Example

4.2 ENTERPRISE TREE

The Enterprise Tree always displays on the left side of the screen. By default, your Enterprise has two groups: Enterprise Group and Install Group. In addition, you can create groups to mirror your organization's group hierarchy. By default, the Enterprise Tree is collapsed to the highest group, which is the Enterprise Group. You must expand the Enterprise Group to see any groups created by your organization. As you select different groups from the Enterprise Tree, you will notice the number displayed on each tab change.

A black right-pointing arrow indicates a collapsed folder; a black down-pointing arrow indicates an expanded arrow. A blank paper icon indicates the folder does not have additional groups below it.

The main use of the Enterprise Tree is to allow you to quickly select any group in your organization hierarchy and focus on only the components associated with the selected group.

To Expand/Collapse the Enterprise Tree:

- 1. Click a black right-point arrow to expand a group structure.
- FleetOutlook displays a black down-pointing arrow and then the sub-groups. To collapse the group, click the black down-pointing arrow.
- 2. To see the drivers, vehicles, users, alerts or landmarks for a specific group, select the group from the Enterprise Tree.
- FleetOutlook displays a number in parenthesis on each tab to indicate the number of components in that group. In the screen shot below, we have selected the Marketing group, which contains one vehicle, one driver, twenty-six landmarks and two alerts.

aiAmp® Fleet	Outlook A	dmin		All-Star Utilities Customer Demo Help Sign C Devices (8) Vehicles (2) Assets Drivers (1) Users Groups (1) Landmarks (77) Alerts Sup					
Find		tive (6)	Devices	(8) Vehicles (2)	Assets Drivers (1) Users Groups	(1) Landmarks (7)	Alerts Support	
DEMO2 Enterprise Group	Filter Find		▼ contains	v	Go	Reset			
V 🗁 Landmark Services Divisio	MIN	ESN	MDN	Name	Device Model	Interface Profile ID	Device Last Reporter	Provisioning Status	
Business Services	4541002644	4541002644		Delivery BA	R30C	29	03/30/2013 05:44 AM		
Residential Services	4641121171	4641121171		Joes car - Roy McIvo	LMU-2620C	54392	06/01/2015 12:16 PM	Never Provisioned	
Pilot Projects									
R30 Turn-Based Updates									
WO Services Division									
DEMO2 Install									
Reports									
TechConnect									
N									
6									
	Query								

Figure 5: Enterprise Group Tree

4.3 HELP BUTTON

FleetOutlook Help contains several self-service training videos as well as valuable user manuals.



Figure 6: FleetOutlook Help Portal

5 GENERAL NAVIGATION TIPS

This section provides an overview of the standard functionality available in many of the FleetOutlook Admin modules.

5.1 CLOSE WITHOUT SAVING CHANGES

You can close any screen without saving changes by clicking the Close button in the upper-right corner of the screen.

Edit Vehicle		×
Vehicle ID: 🕴	YZE 2789	
Vehicle name: *	Chev Astro Van	
License number:	YZE 8927	
License state:	VA	
VIN:		
Vehicle Category	Support Vehicle	
Created: Paul La	Vigne 07-Sep-2011 04:39:14 PM EDT	OK Cancel

Figure 7: Close without Saving

5.2 SORT OPTIONS

You can sort a FleetOutlook list by any column heading in ascending or descending order. A small, black triangle indicates by which column the list is sorted and in what order. Left-click on a column heading once and FleetOutlook sorts the list in ascending order. Double-click on a column heading and FleetOutlook sorts the list in descending order. Left-click on a previously sorted column heading and FleetOutlook reverses the current sort order.

Driver ID	First Name	Last Name 🔺	Display Name	Vehicle ID	ESN	Driver Category	2nd Driver Cate	Schedule Profile	
Zaid	Zaid	Al-Timimi	Zaid Zaid Al-Tim	Zaid Test	4332001006	Cool Doodz		_	4
Pick Anthon	Rick	Arthory	Rick Anthony Riv	CX-9	مطيعي بدق ال			and an and a second	y

Figure 8: Sort Capability

5.3 EXPAND COLUMNS

You can expand or collapse any column heading by resting your mouse on the line dividing two column headings. When your mouse turns to a double-sided arrow, left-click and drag to expand or collapse.

<u>Note:</u> Any modifications you make to column sizes or positions are applied to the current FleetOutlook session. The settings are not saved for subsequent logins.



Figure 9: Expand a Column Heading

5.4 HIGHLIGHTS

Point to any row or name in a list and FleetOutlook highlights that row or name.

) Filter	O Find Icon	▼ contains	•	Go Reset		
con	Name 🔺	Address	Geometry	Landmark Category	Radius	Group
4	WRX Herndon		Polygon	Offices		WRXMA Enterprise Group
٢	WRX-SF	595 MARKET ST SAN FRAN	Polygon	Offices		WRXMA Enterprise Group
4	Zone 1 (20171)	Fairfax, VA 20171	Place Name	Zones		WRXMA Enterprise Group

Figure 10: Row Highlights

5.5 REFRESH BUTTON

Located at the lower right corner of most FleetOutlook screens is the Refresh button. After updating data in FleetOutlook or FleetOutlook Admin, you may need to refresh to display the most current information.



5.6 FILTER

The Filter feature, located above most FleetOutlook lists, limits the display of rows on a list to only those that meet your specified criteria. The Filter feature contains two options: Cumulative Filter and Advanced Filter. Advanced Filter allows you to filter a FleetOutlook list by more than one condition.

Use the Find feature to search through long lists to find a specific value. If FleetOutlook finds the value, the row is selected. The Find feature includes a Wrap option. When selected, FleetOutlook continues searching for a specified value at the beginning of a list when the end of a list is reached.

) Filter 🔵 Find	MIN	▼ equals	v	Go	Reset		
MIN 🔺	ESN	MDN	Name	Device Model	Interface Profile ID	Device Last Reporte	Provisioning Status
4342001022	4342001022		Shep2 Shep2 McKee:	R26C	2371	12/12/2012 11:47 A	Never Provisioned
	Define Filter				×		
	Filter Conditions:	match all condition	ns 🛛 🔻				
	MIN contains '434	42001022'		Ren	nove		
	Add Condition:						

Figure 11: Filter a List Functionality

5.7 COPY OPTIONS

You can copy the data displayed in many of the FleetOutlook lists to CSV or TSV formats. Right-click anywhere on a list, and then select a copy option from the shortcut menu.

If you want to copy only select rows, use the Shift key to select adjacent rows and the Ctrl key to select non-adjacent rows, and then right-click to display the shortcut menu.

Note: Not all FleetOutlook lists support the copy functionality, and not all lists have the ability to select more than one row at a time.

	Landmark Category Radius	-
· ·	Copy-(ctrl+c) Options:	1
×	List Based TSV	1 1
	List Based CSV	
	Selection Based CSV	T
	Selection Based TSV	
	Copy All Items	
	Settings	-
7	Global Settings	÷
	About Adobe Flash Player 11.6.602.180	
	Offices	

Figure 12: List Copy Menu

6 **DEVICES**

All vehicles must have an active device assigned to report events and location data in FleetOutlook. Devices report location data as well as PTO events and maximum speed thresholds. Devices are managed by their Device Identification Number (e.g., MIN, ESN or IMEI). This 10-digit number is printed on all device labels. The first three digits of each number represent the device model (e.g., 454 are the first three numbers of the Reporter 30 device).

6.1 ACTIVE/INACTIVE DEVICE TABS

FleetOutlook stores devices by status: active or inactive. The Active tab displays devices by assigned group. Select a group from the Enterprise Tree, and all the active devices assigned to vehicles in the selected group display.

Fleet managers can utilize the Active tab to get a snapshot view of active devices, device-tovehicle assignment and the last time the devices communicated. Devices displayed on the Inactive tab do not report data to FleetOutlook and are not assigned to a vehicle.

WRXMA Enterprise Group									
East Team	• Fi	ilter 🔵 Find 📋	MIN	▼ contain	s 🛛 🔻	Go	et		
Exec Team	MIN		ESN	MDN	Name	Device Model	Interface Profile ID	Device Last Reported	Provisioning Status
Implementation	433	2001004	4332001004		Carmell Carmell Oliver	R26C	2371	12/26/2012 11:24 AM E	Never Provisioned
Installation	433	2001006	4332001006		Zaid Zaid Al-Timimi	R26C	2371	12/05/2012 09:41 AM E	Never Provisioned
Marketing	434	2001022	4342001022		Shep Shep McKee	R26C	2371	12/12/2012 11:47 AM E	Never Provisioned
Morrow	453	1002300	4531002300		FE R30 ESN:4531002300	LMU-30G	2371	09/12/2012 08:28 AM E	Never Provisioned
New Test									
Dperations									
Prod Mgmt									
🔁 Requirements Team									
WRXMA Install									

Note: You cannot deactivate a device if the device has a vehicle assignment.

Figure 13: Active Devices Screen

6.2 QUERY A DEVICE

The Query Device screen displays device settings, enables you to update PTO information and review a historical list of device changes. Querying a device is beneficial to fleet managers as they determine vehicle status or device communication when investigating a device that is not reporting.

To Query a Device:

- 1. Select the group to which the device belongs from the Enterprise Tree.
- 2. Select the **Devices** tab, and then select the **Active** tab.
- 3. Select the device from the list, and then click the **Query** button.
- FleetOutlook displays the Query Device screen.



Figure 14: Device Query Screen

- 4. From the **Device** tab, you can see the date the device last communicated and the last reported location displayed on the map.
- 5. To modify the PTO event names, select the Features tab.

Query Dev	ice 4531002	2300			
Device	Features	CLIPP History			
Digital Inp	ut 1				[
Con	nected To	Bucket 🔻	Leak Detection		
High Sta	atus Name	Bucket Up	OBD	\checkmark	
Low Sta	atus Name	Bucket Down	WiFi		
Omi	t PTO Idle	✓	PND Enabled	\checkmark	
Digital Inp	ut 2		_		
Con	nected To	•			
High Sta	atus Name				
Low Sta	atus Name				
Omi	t PTO Idle				
Digital Inp	ut 3				
Con	nected To	•			
High Sta	atus Name				
Low Sta	atus Name				
Omi	t PTO Idle				
Digital Inp	ut 4				
Con	nected To	▼			
High Sta	atus Name				
Low Sta	atus Name				
ast modifi	ed: Bob Re	eynolds 09-Jul-2012 05:57:15	PM EDT		
reated:	Bob Rev	nolds 26-Jun-2012 11:30:04 A	M EDT		Update Feature

Figure 15: Device Features Screen

- 6. Select a digital input option from the **Connected To** drop-down list, or create a new type by typing directly in the field.
- When you create a new type, FleetOutlook Admin saves the type for feature use.
- 7. Specify a High Status Name and Low Status Name.
- 8. If applicable, select the **Omit PTO Idle** check box.
- 9. Click the **Update Features** button.
- 10. Click the **Close** button in the upper-right corner of the screen when finished.

7 VEHICLES

FleetOutlook manages data through vehicles. Each vehicle is assigned a device and driver, if applicable. From the Vehicle tab, you can view and manage the vehicles in the selected group or your entire fleet. The Vehicles tab has two sub-tabs: Active tab and the Recycle Bin tab.

Note: The number of vehicles displayed depends on the group selected from the Enterprise Tree.

Active Tab

The Active sub-tab displays current vehicle assignments including vehicle ID, vehicle name, the assigned driver, assigned device and other vehicle attributes. Using the available buttons displayed at the bottom of the screen, you can quickly modify vehicle settings for a single vehicle or multiple vehicles.

Note: Vehicles only report in FleetOutlook if an active device is assigned.

Recycle Bin Tab

The Recycle Bin tab lists all deactivated vehicles. You can only deactivate a vehicle that does not have a device or a driver assigned. You cannot permanently remove vehicles from FleetOutlook. You can restore deactivated vehicles as needed.

Find		De suele Die									Video Train
WRXMA Enterprise Group		Recycle Bin									
Exec Team	Filter Filter	Vehicle ID	•	ontains	•	G	Reset				
Implementation	Vehicle ID	Vehicle Name	Driver ID	First Name	Last Name	Device ESN	Verified OD	Display Name	Vehicle Icon	Vehicle Status	Vehicle Category
Installation	YZE 2789	Chev Astro Van	1085	Paul	LaVigne	4160001085	Yes	1085 Paul LaVi		Active	EmployeeOwned
Marketing											
Morrow	Michael C	Michael C					No	Michael C	-	Active	
New Test	FE R26	Ford Expedition	Shep2	Shep2	McKee2	4342001022	No	Shep2 Shep2 M		Active	
Operations											
Prod Mgmt	VW Passat	VW Passat	54013 Martin	Chris	Martin		No	54013 Martin C	200	Active	
Requirements Team	VW CC	vw cc					No	vw cc	100	Active	
	Support Vehicle	Support Vehicle	TEST	Driver	Support Vehicle		No	TEST Driver Sup		Active	Support Vehicle
	Lexus RX400h	Mohan's Ride	Mohan Rao	Mohan	Rao	4160006904	Yes	Mohan Rao Mol		Active	EmployeeOwned
	BMW X5	BMW X5				4160008609	Yes	BMW X5 ESN:4:		Active	
	Lexus SUV	Lexus SUV	Maria Izurieta	Maria	Izurieta	4160009177	No	Maria Izurieta M	200	Active	EmployeeOwned
	FE R30	Ford Expedition	Shep	Shep	McKee	4531002300	No	Shep Shep McK		Active	
	Zaid Test	Zaid Test	Zaid	Zaid	Al-Timimi	4332001006	No	Zaid Zaid Al-Tir		Active	
	Add Edit	Change	Crewn Read	ace Device	Deactivate	Vehicle Icon	Vehicle Cate	egory Uploa			port Aud

Figure 16: Vehicles List

7.1 VEHICLE ADMIN OPTIONS

The buttons displayed at the bottom of the Vehicle tabs enable you to quickly modify vehicle settings for a single vehicle or multiple vehicles. To modify the settings for more than one vehicle at a time, use the Shift key to select adjacent vehicle rows and the Ctrl key to select non-adjacent vehicle rows, and then click the appropriate action button. Some buttons only allow for one vehicle modification at a time, such as the Replace Device button.

Add Edit Change Group	Replace Device Deactivate Vehicle Icon	Vehicle Category Upload F	Reset Odometer Export Audit
	Figure 17: Vehicle - A	ctive Tab Options	

Restore	Audit
---------	-------

Figure 18: Vehicle - Recycle Bin Tab Options

- Add Add a new vehicle.
- Edit Edit the properties of the selected vehicle.
- **Change Group** Displays the Change Group screen and enables you to move the selected vehicle(s) from one group to another.
- **Replace Device** Displays the Replace Device screen and allows you to assign a different device to the selected vehicle.
- **Deactivate** Removes the selected vehicle(s) from the Active tab and stores the selected vehicle(s) on the Recycle Bin tab. Deactivated vehicles do not report in FleetOutlook. You cannot permanently remove vehicles from FleetOutlook. Deactivated vehicles always display on the Recycle Bin list.
- Vehicle Icon Assign a vehicle icon to the selected vehicle(s).
- Vehicle Category Assign a vehicle category to the selected vehicle(s).
- **Upload** Displays the Bulk Upload screen and enables you to create multiple vehicles with a single action.
- **Reset Odometer** Only available for vehicles that have a verified odometer reading. The Reset Odometer option resets the vehicle's odometer to the accumulated distance traveled since initial installation.
- **Export** The Export Vehicle Wallet option exports the active vehicle list to CSV file and sends the file to the requested email address.
- Audit You can access vehicle history for a selected vehicle by clicking the Audit button. The Vehicle History screen displays important information about the record change history including when it was edited, who edited it and what valued was changed.
- **Restore** Only available on the Recycle Bin tab. The Restore option enables you to activate a previously deactivated vehicle. Once you have reactivated a vehicle, you must assign a device to the vehicle and, if preferred, a driver.

7.2 ADD OR EDIT A VEHICLE

A vehicle is the basis of most of the organization within FleetOutlook. Each vehicle must have an assigned device to report data in FleetOutlook. While assigning a driver is not required, we recommend assigning a driver to each vehicle. This enables you to associate the vehicle activity with a specific driver and monitor work habits and performance.

To Add or Edit a Vehicle:

- 1. From the Enterprise Tree, select the group to which you want to add a vehicle.
- You can assign vehicles to one or more groups; however, a vehicle cannot be in more than one exclusive group of the same level in the hierarchy. For example, a vehicle cannot be in two supervisor groups if both of the supervisor groups are exclusive.

DEMO2 Enterprise Group	• Filter 🔾	Find Vehicle I	DV	contains	▼		Go Rese	et			
DEMO2 Install	Vehicle ID	Vehicle Name	Driver ID	First Name	Last Name	Device ESN	Verified OD	Display Name	Vehicle Icon	Vehicle Status	Vehicle Category
<u> </u>	21D151	VN-320	87728	Paul	Broadwell	00000000126	No	VN-320 - Paul I	1	Active	Service Van
	11M144	VN-302	13084-01	Mary	Shull	00000000133	No	VN-302 - Mary		Active	Service Van
	69J512	VN-315	87887	David	Brookings	00000000113	No	VN-315 - David	-	Active	Service Van
	450103	VN-312	11211	Brian	Hitchcroft	00000000118	No	VN-312 - Brian	5	Active	Service Van
	97Q340	BT-101	42644	Henry	Spiffter	00000000148	Yes	BT-101 - Henry		Active	Bucket Truck
	47B716	PT-202	35876	Barb	Gossling	00000000129	No	PT-202 - Barb	-	Active	Pickup Truck
	34C902	VN-308	88370	Anton	Desraili	00000000139	No	VN-308 - Antor	-	Active	Service Van
	753844	VN-331	38210	Kenneth	Lead	00000000105	No	VN-331 - Kenn		Active	Service Van
	34X832	VN-307	13823	Ronald	Galbraith	00000000140	Yes	VN-307 - Rona		Active	Service Van

2. Select the **Vehicles** tab.

Figure 19: Active Vehicles - Add New Vehicle/Edit Existing Vehicle

- 3. Click the **Add** button.
- The Add Vehicle screen displays.
- To edit an existing vehicle's settings, select the vehicle from the Active list, and then click the **Edit** button. The Edit Vehicle screen displays.

Figure 20: Add Vehicle Screen

4. Enter the Vehicle ID.

- The Vehicle ID is a required field and must be unique. We recommend that you use the last 6-8 digits of the VIN number. If you deactivate a vehicle, you cannot reuse the Vehicle ID for another vehicle.
- 5. Enter the Vehicle Name.
- The Vehicle Name is a required field and is used to identify the vehicle within the FleetOutlook application.
- To assign a driver to the vehicle, create and save the vehicle. Do not assign a driver while creating the vehicle.
- Driver-to-vehicle assignments are not required; however, drivers are used in FleetOutlook to associate vehicle activity to an individual driver. Additionally, several reports are driver focused, where the focus is on driver performance regardless of the assigned vehicle.
- 6. Click the **Install** button to assign a device to the vehicle.
- The Install Device screen displays.

Insta	e Camp allation nical Development	ŧ			
	nd MIN			5310	Go Reset
MIN	ESN	MDN	Name	Device Model	Status
4531002305	4531002305		ESN:4531002305		ACTIVATED
4531002323	4531002323		ESN:453100232:		ACTIVATED
2 Item(s)					OK Cancel

Figure 21: Assign Device Screen

- 7. From the top pane, scroll to the bottom of the list and select the **Install** group.
- FleetOutlook displays all of the active devices not assigned to vehicles.
- 8. Enter the last five digits of the MIN in the MIN field, and then click Go button.
- FleetOutlook populates the list with possible device matches.
- You can only assign devices that are currently active in FleetOutlook and not assign to another vehicle.
- 9. Select the device that you want to assign to the vehicle, and then click the **OK** button.
- FleetOutlook populates the Device field with the device's information and assigns the device to the vehicle.

Add Vehicle						×
		Det Fuel	Gro	0d	Eng	Vehi
Vehicle ID						
Vehicle Name		VIN				
Driver	(none) Assign	License Plate				
Device	(none) Install	License State				
Vehicle Icon	Change	Make				
Vehicle Status	Active	Model				
		Year				
Vehicle Category	•	Engine				
Unit Type	Vehicle 🛛 🔻					
		Transmission				
						Add

Figure 22: Add Vehicle Screen - Device Installed

- 10. Click the Vehicle Icon, and then select a vehicle type and color.
- Refer to <u>Vehicle Icons and Colors</u> for a complete list of available icons and colors.
- 11. Select Machine or Vehicle from the **Unit Type** drop-down field.

- When Machine is selected, the map tool tip displays the equipment's serial # and cumulative hours of use. The breadcrumb detail displays the engine hours meter instead of the odometer for each event, as well as the cumulative hours for each day.
- 12. On the **Details** tab, populate vehicle identification fields. These fields are not required, but are used in FleetOutlook reports.

Add Vehicle								×
Vehicle ID Vehicle Name Driver Device Vehicle Icon Vehicle Status Vehicle Category Unit Type	123-5 123-5 (none) (none) Active V Vehicle V	Assign Install	E	PA Estimal	Groups Odom Fuel Type Fuel Tank Capacity uel Efficiency - Highway ted Fuel Efficiency - City el Efficiency - Combined	Gase 18 23 19	Engine Vehicle Jine v gallons mpg mpg mpg	
								Add

Figure 23: Vehicle Fuel Settings

- 13. Select the Fuel tab, and then populate fields based on manufacturer specifications.
- 14. Fuel fields are not required, but are used on the Fuel Efficiency Report, which is available to customers using a device that reports vehicle bus data.

Add Vehicle									,
			Det	Fuel	Groups	Odometer	Engine	Vehicle	
Vehicle ID	123-5		Business	Services					
Vehicle Name	123-5			nterprise Gr	roup				
Driver	(none)	Assign							
Device	(none)	Install							
Vehicle Icon	Change								
Vehicle Status	Active								
Vehicle Category									
Unit Type	Vehicle 🛛 🔻								
			Add						Remove
									Add

Figure 24: Add Groups Button

- 15. Select the **Groups** tab.
- 16. Click the Add button located on the lower-left side of the Groups tab.
- 17. Verify that you clicked the Add button associated with Groups tab and not the Add button for the Add Vehicle screen.
- 18. The Choose Groups screen displays.



Figure 25: Choose Group Screen

- 19. The Enterprise Tree displays on the far left. The groups currently assigned to the vehicle in the middle and a list of available groups on the far right.
- 20. Select the Group(s) from the **Unassigned** list, and then click the < Add button.
- 21. You can also select and add groups from the Enterprise Tree displayed on the left side of the Choose Group screen.
- 22. You can add multiple groups at once. Use the Shift key to select adjacent groups and the Ctrl key to select non-adjacent groups.
- 23. A vehicle can only be in one exclusive group within the hierarchy level. An error message displays if you attempt to place a vehicle in two exclusive groups that are on the same level. You can assign the vehicle to as many non-exclusive groups as necessary.
- 24. When finished assigning groups, click the **OK** button.
- 25. Click the **Odometer** tab.

			Details Fuel Grou	ups Odometer Engine Hrs Vehicle Bus	
Vehicle ID	123-5				
Vehicle Name	123-5	1	Odometer Reading	142639 Miles	
Driver	(none)	Assign	Date Taken	11/08/2016	
Device	(none)	Install	Time Taken	9 • : 31 • • AM • PM	
Vehicle Icon	Change		Time Zone	EST	
			Odometer is currently	Unverified	
Vehicle Status	Active				
Vehicle Category	•				
Unit Type	Vehicle 🗸				

Figure 26: Vehicle Odometer Settings

- 26. Enter the vehicle's mileage in the **Odometer Reading** field.
- 27. Select the odometer reading **Date Taken** and **Time Taken**.

Add Vehicle			×
Add Vehicle ID Vehicle ID Vehicle Name Driver Device Vehicle Icon Vehicle Status Vehicle Category Unit Type	123-5 123-5 (none) Assign (none) Install Active Vehicle V	Details Fuel Groups Odometer Engine Hrs Vehicle Bus Engine Hrs. Reading 2596 hours Date Taken 11/08/2016 Time Taken 9 - : 31 - • AM PM Time Zone EST Engine Hrs. is currently Unverified	×
		Add	

Figure 27: Engine Hours Setting

- 28. Click the Engine Hours tab.
- 29. Enter the Engine Hours Reading.
- 30. Select the engine hours reading Date Taken and Time Taken.
- 31. If your vehicle has a device that report OBD-II or Jbus data, click the **Vehicle Bus** tab displays what fields the selected vehicle reports. Select whether to use the reported values from the vehicle bus or data derived from the device.

		Det Fuel Gro O	do Engi V	eh
Vehicle ID	Heavy Duty			
Vehicle Name	Heavy Duty	Vehicle Bus Type	OBD-II	
Driver	S. Wonder Assign Remove	Protocol ID	6-CAN 11 bit	
Device	MIN:4332150345 ESN:4332150345 Install		Readable From Bus	Use Bus \
Vehicle Icon		Reports VIN	true	\checkmark
Venicle Icon	Change	Reports Vehicle Speed	true	\checkmark
Vehicle Status	Active 🔻	Reports Vehicle Odometer	false	
Vehicle Category	Support Vehicle	Reports Fuel Consumption	true	\checkmark
Unit Type	Vehicle V			

Figure 28: Vehicle Bus

32. Click the **Add** button.

• FleetOutlook populates the vehicle on the Active tab. The vehicle will begin reporting location-based data and events (e.g., moving, stop, idle, etc.) in FleetOutlook.

7.2.1 VEHICLE ICONS AND COLORS

FleetOutlook Admin offers 18 different vehicle icon options and 12 color options. Differentiating the vehicles by icon type and color helps you quickly identify vehicles on FleetOutlook maps. For example, assign the vehicle type (e.g., vans, bucket trucks, etc.), and then different driver skill by the vehicle color or differentiate vehicle equipment capability by color.

<u>Note:</u> You can change the vehicle icon type and color through the Add/Edit Vehicle screen as well as directly from the Vehicles tab.



Figure 29: Selection Vehicle Type and Color Screen

	Icon Name	lcon	Icon Name	lcon
	Generic Asset	•	Sedan	200
Red Orange	Bucket Truck		Service Van	
Yellow Green	Building Crane	12	Step Van	
ark Green Blue	Bulldozer	R. Co	Tanker Truck	
Light Blue Purple	Cement Truck		Tow Truck	
Brown Pink	Dump Truck		Tractor Trailer	
Gray White	Excavator	\mathbf{Q}	Trailer	
	Flatbed Truck		Trash Truck	
	Pickup Truck		Box Truck	

Figure 30: Available Vehicle Icons and Colors

Red Orange Yellow Green Dark Gre Blue Light Blu

7.3 ASSIGN A DRIVER TO A VEHICLE

A driver-to-vehicle assignment associates vehicle activity to an individual driver. Drivers can only be assigned to one vehicle at a time, and each vehicle can only have one driver assigned at a time. You can only assign an available driver to a vehicle and if they are in the same group.

<u>Note:</u> If you have not created the driver profile in FleetOutlook Admin, refer to **Section 8.2 Add** or **Edit a Driver** for detailed instructions.

To Assign a Driver to a Vehicle:

- 1. Select the Vehicles tab, and then select the Active sub-tab.
- 2. Select the vehicle to which you want to assign a driver, and then click the Edit button.

Find		Active (6)	Recycle Bin									Video Training
East Team	0		Find Vehicle ID	• Co	ntains	•		Go	Reset			
Implementation		Vehicle ID	Vehicle Name	Driver ID	First Name	Last Name	Device ESN	Verified OD	Display Nar	Vehicle Ico	Vehicle Sta	Vehicle Category
Installation		11M144Y	VN-302				453100230	Yes	11M144Y E		Active	North Sector
Marketing		370Z	370Z	1003	Kc	War	434200249	No	1003 Kc Wa		Active	
New Test		MIN 7761	MIN 7761	75839 Lane	Doug	Laneman		No	75839 Lane		Active	
Training		4531002302	4531002302					No	453100230		Active	Test Cat
Prod Mgmt Requirements Team		MIN 8031	MIN 8031	59923 Free	Mick	Freemanso		No	59923 Free		Active	
WRXMA Install		MIN 1002	Min 1002	1002	Keith	Warren		No	1002 Keith		Active	EmployeeOwned
		Add Ed	lit Change Grou		e Device	Deactivate	Vehicle		ehicle Categ	ory Uplo		et Odometer Export Audit

Figure 31: Select Vehicle to Edit

• The Edit Vehicle screen displays.

Edit Vehicle						×
Vehicle ID Vehicle Name Driver Device Vehicle Icon Vehicle Status Vehicle Category Unit Type	SC001 Shop car 001 (none) Assign (none) Install Change Active Vehicle V	Det Fue	Groups Odometer ABCD1234 VA BMW 3 Series 2000	Engine Hrs	Vehicle Bus	
Last modified: Ed Fenley 15-De Created: Ed Fenley 16-Jan-2	c-2016 11:53:02 AM EST 2015 02:22:57 PM EST					Save

Figure 32: Edit Vehicle Settings Screen

- 3. Click the **Assign** button.
- 4. The Change Selection screen displays.

Marketing	3					
Morrow						
🗋 New Test						
🔻 🚞 Operation	าร					
🗋 Trainir	ng					
	Driver ID	▼ contai	ns 🔻		Go	leset
) Filter 🔵 Find	Driver ID					
Filter Find	First Name	Last Name	Vehicle ID	Vehicle Name	Device GUID	De
			Vehicle ID 370Z	Vehicle Name	Device GUID	
Driver ID 🔺	First Name	Last Name				
Driver ID	First Name Kc Bob	Last Name War				
Driver ID 🔺	First Name Kc Bob Mick	Last Name War Smith	370Z	370Z		D e 43
Driver ID	First Name Kc Bob Mick	Last Name War Smith Freemanson	370Z MIN 8031	370Z MIN 8031		

Figure 33: Assign Driver Screen

- 5. From the top pane, select the group to which the driver is assigned.
- FleetOutlook displays all of the drivers assigned to the selected group.
- 6. Select the driver that you want to assign to the vehicle, and then click the OK button.
- A driver can only be assigned to one vehicle at a time. If you attempt to assign a driver who is already assigned to another vehicle, a warning message displays at the bottom of the screen. If you continue to reassign the driver to the new vehicle assignment, FleetOutlook removes the driver from the existing vehicle assignment and assigns the driver to the new vehicle assignment.

I	ally and a second se
6 Item(s)	WARNING! The selected Driver is already assigned to vehicle: MIN 7761.
	OK Cancel

Figure 34: Warning Message - Driver Selection

• FleetOutlook populates the Driver field with the driver's information and assigns the driver to the vehicle.

Edit Vehicle									×
Vehicle ID Vehicle Name Driver Device Vehicle ICon Vehicle Status Vehicle Status Vehicle Category Unit Type	SC001 Shop car 001 Tin Cup (none) Change Active • Vehicle •	Assign Install	Remove	State Make E Model 3 Year 2 ngine	Groups ABCD1234 //A BMW 3 Series 2000	Odome	Engine	Vehicle	^
Last modified: Ed Fenley 15-Dec	c-2016 11:53:02 AM EST								Save
Created: Ed Fenley 16-Jan-2	015 02:22:57 PM EST								Jave

Figure 35: Driver Assigned

7. Click the Save button.

7.4 REMOVE A DRIVER FROM ASSIGNED VEHICLE

As your drivers move shifts or groups, you may need to remove a driver from a vehicle assignment. FleetOutlook Admin makes it easy to keep your driver-to-vehicle assignments current.

To Remove a Driver from an Assigned Vehicle:

- 1. Select the Vehicles tab, and then select the Active sub-tab.
- 2. Select the vehicle to which you want to remove the driver, and then click the Edit button.

Find												Vid	leo Trai
BWRXMA Enterprise Group	Active (6)	Recycle Bin											
East Team	•) Filter	Find Vehicle ID	•	contains	•			Go Res	et				
Exec Team													
Implementation	Vehicle ID	Vehicle Name	Driver ID	First Name	Last Name	Device ESI	Verified OD	Display Na	Vehicle Ico	Vehicle Sta	Vehicle Category		
Installation	370Z	370Z	1003	Kc	War	434200249	No	1003 Kc W	200	Active			
Marketing	11M144Y	VN-302	Bob_Smith	Bob	Smith	45310023(Yes	Bob_Smith		Active	North Sector		
New Test	MIN 7761	MIN 7761	75839 Lan	Doug	Laneman		No	75839 Lan		Active			
Training	 453100230	4531002302					No	45310023(Active	Test Cat		
Requirements Team	MIN 8031	MIN 8031	59923 Free	Mick	Freemansc		No	59923 Free		Active			
WRXMA Install	MIN 1002	Min 1002	1002	Keith	Warren		No	1002 Keith		Active	EmployeeOwned		
	Add	Edit Change Gr	oun Ren	lace Device	Deacti	vate V	ehicle Icon	Vehicle (Category	Upload	Reset Odometer	Export	Aud

• The Edit Vehicle screen displays.

Edit Vehicle									×
Vehicle ID Vehicle Name Driver Device Vehicle Icon Vehicle Status Vehicle Category Unit Type	SC001 Shop car 001 Tin Cup (none) Active v Vehicle v	Assign Install	Remove	State Make Model Year ngine	Groups ABCD1234 VA BMW 3 Series 2000	Odome	Engine	Vehicle	
Last modified: Ed Fenley 15-Dec Created: Ed Fenley 16-Jan-2	c-2016 11:53:02 AM EST 015 02:22:57 PM EST							(Save

Figure 36: Edit Vehicle Settings - Remove Driver

- 3. Click the **Remove** button.
- FleetOutlook removes the driver's information from the Driver field.
- 4. Click the **Save** button.

7.5 VEHICLE BULK UPLOAD

You can create and save numerous vehicles at once using FleetOutlook's Bulk Upload feature. Bulk Upload uses a CSV formatted file, which enables you to quickly save numerous vehicles with a single action. FleetOutlook's Vehicle Bulk Upload feature is primarily used for the initial setup of FleetOutlook.

Upload Vehicles							
File VehicleDriver.csv		Browse	Cancel				
Upload Type 🔵 Vehicle	(s) 🔵 Vehicle and Drive	er 🔵 Odometer (Vehicle and Device				
Instructions and Templa	tes Upload Status						
 Template must be 	in CSV format.						
Vehicle Id and Vehic	le Name are required field	s.					
 Existing Vehicle Id, actual odometer reading and date and time reading was taken are required fields. 							
 Click the link beside vehicles. 	de template to view and d	ownload template fo	r uploading multiple				
 Update the templa 	ite and save to your com	outer as a CSV file fo	ormat.				
 Select browse butt 	on, locate the file and sel	ect the Upload butto	n.	•			
Template(s): <u>Vehic</u>			Vehicle and Device				

Figure 37: Vehicle Bulk Upload Templates
Vehicle Bulk Upload Considerations:

Vehicles – Use for the upload of vehicle specific data, including VIN, license tag, make and model. Vehicle ID and Vehicle Name are required fields. The Use Telematics and Idle Gal per Hour columns are not currently used in FleetOutlook and may be left blank. If the Vehicle ID has been used in the past, an error will result if you attempt to upload the same Vehicle ID. Requires manual driver-to-vehicle assignments after the upload is complete.

Vehicle and Driver – Use the Vehicles and Drivers template to add the vehicle and create the driver-to-vehicle at the same time. All fields are required. You cannot use this template if the Vehicle IDs and Driver IDs exist in either the Active list or the Deactivated list. After successful upload of vehicles and assigned drivers, you will need to update some vehicle details, which are optional, and assign groups.

Setup all groups first, as this will allow you to upload drivers into specific groups. Before beginning the upload sequence, select the group you wish to place the vehicles in during the upload. If you wish to have them placed in several groups, you will need to perform several uploads. If Driver IDs exist in FleetOutlook, you cannot assign drivers to vehicles using the upload. You must manually assign drivers-to-vehicles.

Odometer – Use to update existing vehicle records with odometer readings. If the vehicle has an odometer reading, the upload will overwrite the current reading to match the value in the bulk upload. All Fields are required. At upload, if a Vehicle ID is NOT found in FleetOutlook, the upload for that vehicle's odometer will fail.

Vehicle and Device – Use the Vehicle and Device template, to create vehicles and create device-to-vehicle assignment at the same time. All fields are required. You cannot use this template if the Vehicle IDs exist in either the Active list or the Deactivated list.

<u>Note:</u> The Drivers tab includes the Drivers Bulk Upload feature, which enables you to create and save full driver profiles with a single action.

To Bulk Upload Vehicles:

- 1. Select the Vehicles tab, and then click the **Upload** button.
- The Upload Vehicles screen displays.



- 2. From the Templates section, click a template link (e.g., Vehicles).
- 3. Navigate to where you want to store the template, and then click the **Save** button.
- 4. Open the downloaded Vehicles template from the save location.

1	Α	В	С	D	E	F	G	Н	1	J	K	L	М	N	0	Р 🛫
1	Vehicle Id	Vehicle N	I VIN	License	License St	Make	Model	Year	Use Telematic	Idle Gal P	Vehicle C	Vehicle S	Fuel Type	Fuel Tank	Fuel Efficiency Highwa	Fuel Efficier.
2	1JXKM123	VN-303	1JXKM123	BTY-0431	CA	Chevy	Express V	2013	FALSE	0.75	North Sec	tor	GASOLINE	31	20	
3																
4																1
-																

- 5. Delete the sample rows of information, and then add the information for your vehicles, drivers, odometer readings or devices. Do not edit the column header names.
- If a required column is blank, the upload will fail.
- 6. Click the **Save** button.
- If you are using Microsoft Excel, you may receive a feature compatibility warning. Click the Yes button to keep the workbook in CSV format.

Microsoft	Excel
1	Landmarks.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format? • To keep this format, which leaves out any incompatible features, click Yes. • To preserve the features, click No. Then save a copy in the latest Excel format. • To see what might be lost, click Help.
	Yes No Help

- 7. Navigate back to **Vehicles** tab in FleetOutlook Admin.
- If the Upload Vehicles screen is not displayed, click the **Upload** button.

- 8. Select the Upload Type option.
- 9. Click the **Browse** button to upload the saved bulk upload file.
- The Open dialog box displays.

Organize 🔻 New folder			·	
Organize 🔻 New folder			i≡ ▼	
🔆 Favorites	<u>^</u>	Name	Date modifie	
🐌 Downloads		🖳 Vehicles	4/9/2013 11:4	
Recent Places				
🧫 Desktop	E			
Libraries Documents Music Pictures SOP Videos				Select a to prev
P Computer	-	< III	•	
AT 05 (C)				

Figure 38: Open Saved Vehicle Template

- 10. Select the saved bulk upload file, and then click the **Open** button.
- FleetOutlook automatically populates the **File** field of the Upload Vehicles screen with the template name.

/ehicles.csv Browse Cancel Upload	
Type • Vehicle(s) Vehicle and Driver Odometer Vehicle and Device	
ctions and Templates Upload Status	
emplate must be in CSV format.	-
<i>Tehicle Id and Vehicle Name</i> are required fields.	
	=
Jpdate the template and save to your computer as a CSV file format.	ľ
	- 84
	Type • Vehicle(s) Vehicle and Driver Odometer Vehicle and Device

Figure 39: Upload Saved Vehicle Data

- 11. Click the **Upload** button.
- FleetOutlook uploads the vehicles and displays the Upload Status tab.

Upload Vehicles		$\square \times$
File Vehicles.csv	Browse Cancel Upload	
Upload Type • Vehicle(s)	○ Vehicle and Driver ○ Odometer ○ Vehicle and Device	
Instructions and Templates	Upload Status	
File: Vehicles.csv		
Total Rows in File: 1 Total	Rows uploaded: 1	
Total Success Rows: 1 Tota	al Failed Rows: 0	
Success Failed		
Vehicle Id	Status	
1JXKM1234	SUCCESS	

Figure 40: Upload Status Tab

• Each row represents a new vehicle. FleetOutlook indicates if the vehicle uploaded successfully or failed. For any vehicles that failed, you will have to fix the errors and re-upload them or create the vehicle manually within FleetOutlook Admin.

- 12. Click the **Close** button in the upper-right corner of the screen.
- FleetOutlook displays all successful vehicles on the Active tab.

7.5.1 VEHICLES TEMPLATE COLUMNS

The following table outlines all of the available columns in the Vehicles template. Required fields are in red font.

Column	Description							
Vehicle ID	Must be a unique value. We recommend last 6-8 digits of VIN. If the Vehicle ID already exists in FleetOutlook, the upload for the vehicle/driver fails.							
Vehicle Name	Vehicle Name is a required field and is used to identify the vehicle within the FleetOutlook application.							
VIN	· ·							
License State	Vehicle Detail fields are used to provide a more in-depth							
Make	description of the vehicle. They are not required fields, but used in some FleetOutlook reports.							
Model								
Year								
Use Telematics	Currently not used. Leave blank.							
Idle Gas Per Hour	Currently not used. Leave blank.							
Vehicle Category	Identifies your vehicles by category. Vehicle Categories are beneficial as you create alerts and landmarks. You can set an alert or landmark to trigger for only specific vehicle categories.							
Vehicle Status ID	Currently not used. Leave blank.							
Fuel Type								
Fuel Tank Capacity	Fuel fields are used to provide a detailed view of fuel efficiency							
Fuel Efficiency Highway	amount the vehicles in your fleet. These fields are not required; however, they are used in the Fuel Efficiency report for vehicles							
Fuel Efficiency City	with a device assigned that reports OBD-II vehicle bus data.							
Fuel Efficiency Combined								

7.5.2 VEHICLE AND DRIVER TEMPLATE COLUMNS

The following table outlines all of the available columns in the Vehicle and Driver template. Required fields are in red font.

Column	Description
Vehicle ID	Must be a unique value. We recommend last 6-8 digits of VIN. If the Vehicle ID already exists in FleetOutlook, the upload for the vehicle/driver fails.
Vehicle Name	Vehicle Name is a required field and is used to identify the vehicle within the FleetOutlook application.
Driver ID	The Driver ID must be a unique value. The field cannot contain spaces or commas. Underscores, periods and hyphens are acceptable. We recommend using a name that you can quickly identify with a driver. Do not use Vehicle ID.
Driver First Name	
Driver Last Name	
Driver Category ID	The Driver Category fields identify your drivers by one or two
2nd Driver Category ID	categories.

7.5.3 ODOMETER TEMPLATE COLUMNS

The following table outlines all of the available columns in the Odometer template. Required fields are in red font.

Column	Description						
Vehicle ID	Must be an exact match the Vehicle ID in FleetOutlook. If the upload does not find the corresponding Vehicle ID, the upload for the selected odometer update fails.						
Odometer Seed Value	Odometer value at time of reading.						
Odometer Seed Date	Date the odometer reading was taken. Must use YYYYMMDD HH:MI format.						
Time Zone	EST, CST, MST and PST						
Odometer Verified	True/False Value						

7.5.4 VEHICLE AND DEVICE COLUMNS

The following table outlines all of the available columns in the Vehicle and Device template. Required fields are in red font.

Column	Description
Vehicle ID	Must be a unique value. We recommend last 6-8 digits of VIN. If the Vehicle ID already exists in FleetOutlook, the upload for the vehicle/device fails.
Vehicle Name	Vehicle Name is a required field and is used to identify the vehicle within the FleetOutlook application.
MIN	The 10 digit device identification number.

8 ASSETS

The Assets tab enables you to manage your non-motorized equipment. The number of assets displayed depends on the group selected from the Enterprise Tree. To view in FleetOutlook, each asset must have a device assigned. The Assets tab has two sub-tabs: Active tab and the Recycle Bin tab.

Note: To enable the Assets tab, contact CalAmp's Technical support by phone: 1-866-456-7522 or by email: solutionsupport@calamp.com.

Active Tab

The Active sub-tab displays assets marked as active for a fleet. This list provides a high-level overview, including asset ID, asset name, the display name, assigned device, icon and category. Using the available buttons displayed at the bottom of the screen, you can quickly modify settings for a single asset or multiple assets.

Recycle Bin Tab

The Recycle Bin tab lists all deactivated assets. You can only deactivate an asset that does not have a device or a driver assigned. You cannot permanently remove assets from FleetOutlook. You can restore deactivated assets as needed.

CarAmp [®] Flee	+(Dutlook Admin			All	-Star Utilities	Bob Reynolds Help Sign Out
Carsamp			Devices (46) Vehicles (45) Assets (3) Drivers	(33) Users Groups (15)	Landmark	s (77) Alerts (28) Roles Support
Find							Video Training
▶ 🔁 DEMO2 Enterprise Group		Active (3) Recycle Bin					
DEMO2 Install Reports	0	Filter Find Asset ID	contains	 • 	GoReset		
TechConnect		Asset ID	Asset Name	Display Name	Device ESN	Asset Icon	Asset Category
		Asset Tracker 3768	CAT-GP-CT-EYE-SC-TH-24-1-R	CAT-GP-CT-EYE-SC-TH-24-1-R		•	
		Dumpster	Dumpster	Dumpster	3131010020	<u> </u>	
		Asset Tracker 2695 KIEWIT	Asset Tracker 2695	Asset Tracker 2695	3143012695		
		Add Edit Chang	e Group Replace Device	Deactivate Asset Icon	Asset Category Uplo	ad Expo	Audit

8.1 ASSET ADMIN OPTIONS

The buttons displayed at the bottom of the Assets tabs enable you to quickly modify settings for a single asset or multiple assets. To modify the settings for more than one asset at a time, use the Shift key to select adjacent rows and the Ctrl key to select non-adjacent rows, and then click the appropriate button. Some buttons only allow for one modification at a time, such as the Replace Device button

ſ	Add	Edit	Change Group	Replace Device	(Deactivate	Asset Icon	Asset Category	Upload	Export	A	Audit	J
1													-



- Add Add a new asset.
- Edit Edit the properties of the selected asset.
- **Change Group** Displays the Change Group screen and enables you to move the selected asset(s) from one group to another.
- **Replace Device** Displays the Replace Device screen and allows you to assign a different device to the selected vehicle.
- **Deactivate** Removes the selected asset(s) from the Active tab and stores the selected asset(s) on the Recycle Bin tab. Deactivated assets do not report in FleetOutlook. You cannot permanently remove assets from FleetOutlook. Deactivated assets always display on the Recycle Bin list.
- Asset Icon Assign an asset icon to the selected asset(s).
- Asset Category Assign an asset category to the selected asset(s).
- **Upload** Displays the Bulk Upload screen and enables you to create multiple assets with a single action.
- **Export** The Export Asset Wallet option exports the active asset list to CSV file and sends the file to the requested email address.
- Audit You can access asset history for a selected asset by clicking the Audit button. The Asset History screen displays important information about the record change history including when it was edited, who edited it and what valued was changed.
- **Restore** Only available on the Recycle Bin tab. The Restore option enables you to activate a previously deactivated asset. Once you have reactivated a asset, you must assign a device to the asset.

8.2 ADD OR EDIT AN ASSET

Each asset must have an assigned device to report data in FleetOutlook. You can only assign TTU-7xx devices to your assets.

To Add or Edit an Asset:

- 1. From the Enterprise Tree, select the group to which you want to add an asset.
- You can assign asset to one or more groups; however, an asset cannot be in more than one exclusive group of the same level in the hierarchy. For example, an asset cannot be in two supervisor groups if both of the supervisor groups are exclusive.
- 2. Select the **Asset** tab, and then click the **Add** button.

DEMO2 Base Group	Active (30)	Recycle Bin									
🕨 🧰 DEMO2 Enterprise Group	• Filter	Find Vehicle I	D	contains	•		Go Rese	et			
DEMO2 Install	Vehicle ID	Vehicle Name	Driver ID	First Name	Last Name	Device ESN	Verified OD	Display Name	Vehicle Icon	Vehicle Status	Vehicle Category
<u> </u>	21D151	VN-320	87728	Paul	Broadwell	00000000126	No	VN-320 - Paul I	1	Active	Service Van
	11M144	VN-302	13084-01	Mary	Shull	00000000133	No	VN-302 - Mary		Active	Service Van
	693512	VN-315	87887	David	Brookings	00000000113	No	VN-315 - David	-	Active	Service Van
	450103	VN-312	11211	Brian	Hitchcroft	00000000118	No	VN-312 - Brian		Active	Service Van
	97Q340	BT-101	42644	Henry	Spiffter	00000000148	Yes	BT-101 - Henry		Active	Bucket Truck
	478716	PT-202	35876	Barb	Gossling	00000000129	No	PT-202 - Barb		Active	Pickup Truck
	34C902	VN-308	88370	Anton	Desraili	00000000139	No	VN-308 - Antor	-	Active	Service Van
	753844	VN-331	38210	Kenneth	Lead	00000000105	No	VN-331 - Kenne		Active	Service Van
	34X832	VN-307	13823	Ronald	Galbraith	00000000140	Yes	VN-307 - Rona	1	Active	Service Van
	Add Ed	it Change	Group	eplace Device	Deactivate	Vehicle Icon	Vehicle C	ategory Up	load Reset	Odometer	Export Aud

Figure 42: Active Asset - Add New Asset/Edit Existing Asset

- To edit an existing asset's settings, select the asset from the Active list, and then click the **Edit** button.
- The Add Asset screen displays.

Add Asset		×	:
		Grou	
Asset ID	Asset1	DEMO2 Enterprise Group	1
Asset Name	Asset1		
Device	(none) Install		
Asset Icon	Change		
Asset Category	Generator V		
		Add	
		Add	/

Figure 43: Add Asset Screen

3. Enter the Asset ID.

- The Asset ID is a required field and must be unique. If you deactivate an asset, you cannot reuse the Asset ID for another asset.
- 4. Enter the Asset Name.
- The Asset Name is a required field and is used to identify the vehicle within the FleetOutlook application.
- 5. Click the **Install** button to assign a device to the asset.
- The Install Device screen displays.

Change selection	n				••
Insta	2 Camp allation inical Developmen	t			Í
WRXMA In	stall				
🖲 Filter 🔵 Fi	nd MIN	v	ntains V	5310	Go Reset
MIN	ESN	MDN	Name	Device Model	Status
4531002305	4531002305		ESN:4531002305		ACTIVATED
4531002323	4531002323		ESN:453100232		ACTIVATED
2 Item(s)					
					OK Cancel

Figure 44: Assign Device Screen

- 6. From the top pane, scroll to the bottom of the list and select the **Install** group.
- FleetOutlook displays all of the active devices not assigned to assets.
- 7. Enter the first four digits of the MIN in the MIN field, and then click Go button.
- FleetOutlook populates the list with possible device matches.
- You can only assign devices currently active in FleetOutlook, but not installed on a vehicle.
- 8. Select the device that you want to assign to the asset, and then click the OK button.
- 9. FleetOutlook populates the Device field with the device's information and assigns the device to the asset.
- 10. Select the Groups tab.

Add Asset			×
		Grou	
Asset ID	Asset1	DEMO2 Enterprise Group	
Asset Name	Asset1		
Device	(none) Install		
Asset Icon	Change		
Asset Category	Generator 🔻		
		Add	Remove
			Add

- 11. Click the Add button located on the lower-left side of the Groups tab.
- 12. Verify that you clicked the Add button associated with Groups tab and not the Add button for the Add Asset screen.
- 13. The Choose Groups screen displays. The Enterprise Tree displays on the far left. The groups currently assigned to the asset in the middle and a list of available groups on the far right.

Choose Groups:							$\square \times$
🔻 🗁 WRXMA Enterprise Group	•		Assigned	6	_	Unassigned	1
East Team		Operat	tions]	Base	Camp	-
Exec Team		WRXM	A Enterprise Group		East	Team	
Implementation					Exec	Team	
Installation					Impl	ementation	
Marketing				< Add	Insta	llation	
Morrow	≣			Remove >	Insta	llation	
New Test				<< Add All	Mark	eting	≣
🔻 🚞 Operations					Morro	w	
Training				Remove Al	New	Test	
Prod Mgmt					Prod	Mgmt	
🔻 🚞 Requirements Team					Requ	irements Team	
Base Camp					Tech	nical Development	
Installation					Train	ing	
	•						•
						ОКСа	ncel
							//

Figure 45: Choose Group Screen

- 14. Select the Group(s) from the **Unassigned** list, and then click the **< Add** button.
- 15. You can also select and add groups from the Enterprise Tree displayed on the left side of the Choose Group screen.
- 16. You can add multiple groups at once. Use the Shift key to select adjacent groups and the Ctrl key to select non-adjacent groups.

- 17. An asset can only be in one exclusive group within the hierarchy level. An error message displays if you attempt to place a vehicle in two exclusive groups that are on the same level. You can assign the asset to as many non-exclusive groups as necessary.
- 18. When finished assigning groups, click the **OK** button.
- 19. Click the Asset Icon, and then select an asset type and color.
- Refer to <u>Vehicle Icons and Colors</u> for a complete list of available icons and colors.

8.3 ASSET BULK UPLOAD

You can create and save numerous assets at once using FleetOutlook's Bulk Upload feature. Bulk Upload uses a CSV formatted file, which enables you to save numerous assets with a single action. FleetOutlook's Asset Bulk Upload feature is primarily used for the initial setup of FleetOutlook.

Asset Bulk Upload Considerations:

Asset(s) – Use for the upload of asset specific data, Asset ID and Asset Name are required fields. If the Asset ID has been used in the past, an error will result if you attempt to upload the same Asset ID. Asset Category is optional.

Asset and Device – Use the Asset and Device template, to create asset and create device-toasset assignment at the same time. Asset Category is optional. You cannot use this template if the Asset IDs exist in either the Active list or the Deactivated list.

To Bulk Upload Assets:

- 1. Select the Assets tab, and then click the **Upload** button.
- The Upload Assets screen displays.

e	Browse Cancel Upload	
oload Type 🛛 Asset(s) 🔵) Asset and Device	
Instructions and Templates	Upload Status	
•		-
 Template must be in CS 	V format.	
 Asset Id and Asset Name 	are required fields.	
 Existing Asset Id, actual of fields. 	odometer reading and date and time reading was taken are require	ed i
 Click the link beside ten vehicles. 	nplate to view and download template for uploading multiple	
	d save to your computer as a CSV file format.	1
 Update the template an 		

- 2. From the Templates section, click a template link (e.g., Asset(s)).
- 3. Navigate to where you want to store the template, and then click the Save button.
- 4. Open the downloaded Assets template from the save location.

	Α	В	С	D	E	F
1	Asset Id	Asset Name	Asset Category Id			
2	asset-1	asset-test-name-1	North Sector			
3	asset-2	asset-test-name-2	West Sector			
4						

- 5. Delete the sample rows of information, and then add the information for your assets or devices. Do not edit the column header names.
- If a required column is blank, the upload will fail.
- 6. Click the **Save** button.
- If you are using Microsoft Excel, you may receive a feature compatibility warning. Click the **Yes** button to keep the workbook in CSV format.

Microsoft I	Excel
1	Landmarks.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format? • To keep this format, which leaves out any incompatible features, click Yes. • To preserve the features, click No. Then save a copy in the latest Excel format. • To see what might be lost, click Help.
	Yes No Help

- Navigate back to **Assets** tab in FleetOutlook Admin. If the Upload Assets screen is not displayed, click the **Upload** button.
- 7. Select the Upload Type option.
- 8. Click the **Browse** button to upload the saved bulk upload file.
- The Open dialog box displays.



Figure 46: Open Saved Asset Template

9. Select the saved bulk upload file, and then click the **Open** button.

• FleetOutlook automatically populates the **File** field of the Upload Assets screen with the template name.

Upload Assets	×
File AssetDevice.csv Browse Cancel Upload	
Upload Type Asset(s) Asset and Device	
Instructions and Templates Upload Status	
Template must be in CSV format.	-
Asset Id and Asset Name are required fields.	
 Existing Asset Id, actual odometer reading and date and time reading was taken are required fields. 	≣
 Click the link beside template to view and download template for uploading multiple vehicles. 	
 Update the template and save to your computer as a CSV file format. 	
Select browse button, locate the file and select the Upload button.	•
Template(s): <u>Asset(s)</u> <u>Asset and Device</u>	

Figure 47: Upload Saved Vehicle Data

10. Click the **Upload** button.

• FleetOutlook uploads the assets and displays the Upload Status tab.

Upload Assets		×
File Assets.c	:sv	Browse Cancel Upload
Upload Type (• Asset(s)) Asset and Device
Instructions a	nd Templates	Upload Status
File: Assets.csv		
Total Rows in F		kows uploaded: 1
	Failed	Franed Kows: 0
Asset Id		Status
asset-1		SUCCESS

Figure 48: Upload Status Tab

- Each row represents a new asset. FleetOutlook indicates if the asset uploaded successfully or failed. For any asset that failed, you will have to fix the errors and re-upload them or create the asset manually within FleetOutlook Admin.
- 11. Click the **Close** button in the upper-right corner of the screen.
- FleetOutlook displays all successful assets on the Active tab.

8.3.1 ASSET TEMPLATE COLUMNS

Column	Description
Asset ID	Must be a unique value. If the Asset ID already exists in FleetOutlook, the upload for the Asset/device fails.
Asset Name	Asset Name is a required field and is used to identify the asset within the FleetOutlook application.
Asset Category Id	Identifies your assets by category. Asset Categories are beneficial as you create alerts and landmarks. You can set an alert or landmark to trigger for only specific asset categories

8.3.2 ASSET AND DEVICE TEMPLATE COLUMNS

Column	Description
Asset ID	Must be a unique value. If the Asset ID already exists in FleetOutlook, the upload for the Asset/device fails.
Asset Name	Asset Name is a required field and is used to identify the asset within the FleetOutlook application.
Asset Category Id	Identifies your assets by category. Asset Categories are beneficial as you create alerts and landmarks. You can set an alert or landmark to trigger for only specific asset categories
MIN	The 10 digit device identification number.

9 DRIVERS

FleetOutlook manages data through vehicles. Drivers assigned to vehicles associate vehicle activity with an individual driver, and then you can analyze driver work habits and performance. From the Drivers tab, you can view and manage the drivers in the selected group or your entire fleet and the corresponding schedule profiles. The Drivers tab has three sub-tabs: Active tab, Recycle Bin tab and Schedule Profiles tab.

Note: The number of drivers displayed depends on the group selected from the Enterprise Tree.

Active Tab

The Active sub-tab displays, at a glance, current vehicle assignments, driver categories and assigned schedule profiles. Using the available buttons displayed at the bottom of the screen, you can quickly modify driver settings for a single driver or multiple drivers.

Recycle Bin Tab

The Recycle Bin tab lists all deactivated drivers. You can only deactivate a driver that is not assigned to a vehicle. You cannot permanently remove drivers from FleetOutlook. You can restore deactivated drivers as needed. You cannot reuse a Driver ID for a new driver.

Schedule Profiles Tab

The Schedule Profiles tab lists all the schedules created for the drivers in the selected group or your entire fleet. From this tab, you can add new schedule profiles, edit existing schedule profiles or permanently remove profiles.

ID Buttons Tab

The ID Buttons tab lists all of the ID Buttons that have been loaded into the enterprise. From this tab you can add, edit, delete and upload ID Buttons.

QARWD Enterprise Group							
CEVA - Project	Filter Find	ID Button 🛛 🔻 con	tains 🛛 🔻	G	Reset		
▶ 🚞 East Coast	ID Button	Driver ID	First Name	Last Name	Vehicle Name	Assigned Date	Assigned By
▶ 🚞 Great White North	CA0000178B740B01	OB_2620_3585_Key2B	3585_Key2B	3585_Key2B		07/16/2015 06:24 PM E	Statistical Information
▶ 🚞 Gulf Coast	940000178BD92A01	OB_2620_3585_Key2A	3585_Key2A	3585_Key2A	QA 2798	07/16/2015 06:23 PM E	shares we wanted
Lee Douthwaite	360000178BC93D01	PCB 93D01	PCB	93D01		07/07/2015 07:37 AM EL	Section 41
🗋 QA Test 1 Group	8D0000178BD86201	PCB 86201	PCB	86201		07/07/2015 07:36 AM EI	And Street and
▶ 🚞 San Jose							
🕨 🚞 West Coast							
QARWD Install							

Figure 49: Drivers

9.1 DRIVER ADMIN OPTIONS

The buttons displayed at the bottom of the Driver tabs enable you to quickly modify driver settings for a single driver or multiple drivers. To modify the settings for more than one driver at a time, use the Shift key to select adjacent driver rows and the Ctrl key to select non-adjacent driver rows, and then click the appropriate action button.

Add Edit Change Group Deactivate Driver Category Upload Assign Schedule Audit
Figure 50: Driver - Active Tab Options
Restore Audit
Figure 51: Driver - Recycle Bin Tab Options
Add Edit Delete
Figure 52: Driver - Schedule Profiles Tab Options

- **Add** Add a new driver or schedule profile.
- Edit Edit the properties of the selected driver or schedule profile.
- **Change Group** Displays the Change Group screen and enables you to move the selected driver(s) from one group to another.
- **Deactivate** Removes the selected driver(s) from the Active tab and stores the selected driver(s) on the Recycle Bin tab. You cannot permanently remove drivers from FleetOutlook. Deactivated drivers always display on the Recycle Bin tab.
- **Driver Category** Assign or create a driver category or a 2nd driver category for the selected driver(s).
- **Upload** Displays the Bulk Upload screen and enables you to create multiple drivers with a single action.
- Assign Schedule Assign a schedule profile to the selected driver(s).
- Audit You can access driver history for a selected driver by clicking the Audit button. The Driver History screen displays important information about the record change history including when it was edited, who edited it and what valued was changed.
- **Restore** Only available on the Recycle Bin tab. The Restore option enables you to activate a previously deactivated driver. Once you have reactivated a driver, you should assign the driver to a vehicle.
- **Delete** Only available on the Schedule Profiles tab. The Delete option permanently removes the selected schedule profile from FleetOutlook.

9.2 ADD OR EDIT A DRIVER

You monitor driver habits and performance through their assigned vehicles. We recommend that you create and assign a driver for each vehicle in your select group or entire fleet.

To Add or Edit a Driver:

- 1. From the Enterprise Tree, select the group to which you want to add a driver.
- 2. Select the **Drivers** tab, and then select the **Active** tab.

East Team	Filter 🔵 Find	Driver ID	▼ contai	ins 🛛 🔻		Go Reset			
Implementation	Driver ID	First Name	Last Name	Display Name	Vehicle ID	ESN	Driver Category	2nd Driver Categor	Schedule Profil
Installation	1002	Keith	Warren	1002 Keith Warren	MIN 1002				
Marketing	1111	Bob	Smith	1111 Bob Smith			CRM		M-F 6:30 - 6 ES
	1003	Kc	War	1003 Kc War	370Z	4342002491	Executive		
New Test	75839 Laneman	Doug	Laneman	75839 Laneman Do	MIN 7761				
Verations	59923 Freemanson	Mick	Freemanson	59923 Freemanson	MIN 8031				
Training Prod Mgmt									
▶ 🚞 Requirements Team									
		2)							

Figure 53: Active Drivers - Add New Driver/Edit Existing Driver

- 3. Click the **Add** button.
- The Add Driver screen displays.
- To edit an existing driver's settings, select the driver from the Active list, and then click the **Edit** button. The Edit Driver screen displays.

		Grou	Schedule	Starting Location	
Driver ID	Bob_Smith			Starting Loodion	
First Name	Bob	Operation	5		
Last Name	Smith				
Driver Category	Tech I 🔹				
Driver Category	· · · · · · · · · · · · · · · · · · ·				
Vehicle ID	(none)				
		Add			Remov

Figure 54: Add Driver Screen

- 4. Enter the **Driver ID**.
- The Driver ID must be a unique value within your enterprise. The field cannot contain spaces or commas. Underscores, periods and hyphens are acceptable. We recommend using a name that you can quickly identify with a driver. Do not use Vehicle ID.
- 5. Enter the First Name and Last Name fields.
- 6. If applicable, select a Driver Category from the drop-down list.
- The Driver Category fields are free-form text fields. This allows you to create any category in the field. If the category does not exist, FleetOutlook creates the new category. For example, you can use Driver Category to identify the driver's skill level.
- The Driver Category fields identify your drivers by one or two categories. You can filter alerts to trigger for only select categories or support flexible analysis in driver-based reports.
- 7. If applicable, select a 2nd Driver Category from the drop-down list.
- The Vehicle ID is blank until the driver is assigned to a vehicle.
- 8. Select the **Groups** tab.

Add Driver					□ ×
		Grou	Schedule	Starting Location	
Driver ID	Bob_Smith	Operations			
First Name	Bob				
Last Name	Smith				
Driver Category	Tech I				
2nd Driver Category	▼				
Vehicle ID	(none)				
		Add			Remove
		-			Add

Figure 55: Add Driver Groups Button

- 9. Click the Add button located on the lower-left side of the Groups tab.
- Verify that you clicked the Add button associated with Groups tab and not the Add button for the Add Driver screen.
- The Choose Groups screen displays.

Choose Groups:							$\square \times$
🔻 🚞 WRXMA Enterprise Group	•	1	Assigned		_	Unassigned	
East Team			Operations]	Base	Camp	•
Exec Team			WRXMA Enterprise Group		East	Team	
Implementation					Exec	Team	
Installation					Imple	ementation	
Marketing				< Add	Insta	llation	
Morrow	≣			Remove >	Insta	llation	
New Test				<< Add All	Mark	eting	≣∣
🔻 🚞 Operations					Morro	w	
Training				Remove Al	New	Test	
Prod Mgmt					Prod	Mgmt	
🔻 🚞 Requirements Team					Requ	irements Team	
Base Camp					Tech	nical Development	
Installation	•				Train	ing	
De Li la l	•	1				— — — —	
						ОКСа	ncel

Figure 56: Choose Driver Groups Screen

- The Enterprise Tree displays on the far left of the Group Choose screen. The groups currently assigned to the driver in the middle and a list of available groups on the far right.
- 10. Select the Group(s) from the **Unassigned** list, and then click the **< Add** button.

- You can add multiple groups at once. Use the Shift key to select adjacent groups and the Ctrl key to select non-adjacent groups.
- A driver can only belong to one exclusive group within the same hierarchy level.
- You can only assign a driver to a vehicle if they both belong to the same group.
- Only assign drivers to groups where it is geographically likely for the driver to operate the vehicle. This applies to large, geographically dispersed organizations. This makes it easier for driver to vehicle assignments. When an administrator selects a driver for a vehicle, they only see the drivers assigned to the selected group.
- 11. When finished assigning groups, click the **OK** button.
- 12. Select the **Schedule** tab.
- Schedule Profiles are not required; however, FleetOutlook uses schedule profiles to identify the expected workday in determining late departure alerts at the start of a shift or to determine off-hours use of a vehicle.

Add Driver						Π×
		Groups	Sched	lule Starting L	ocation	
Driver ID	Bob_Smith					
First Name	Bob	Schedule	Profile:	M-F 6:30 - 6 E		▼ Eastern
Last Name	Smith			Start	End	_
Driver Category	Tech I 🗸		SUN			
2nd Driver Category	· · · · · · · · · · · · · · · · · · ·	\checkmark	MON	6:30 AM	5:00 PM	
		\checkmark	TUE	6:30 AM	6:00 PM	
Vehicle ID	(none)	\checkmark	WED	6:30 AM	6:00 PM	i
		\checkmark	тни	6:30 AM	6:00 PM	
			FRI			
		v		6:30 AM	6:00 PM	
			SAT			
						Add
						/

Figure 57: Add Driver Screen - Select Schedule Profile

- 13. If applicable, select a Schedule Profile from the drop-down list.
- FleetOutlook populates the working days, start and end time fields and the time zone based on the schedule profile selected.
- You cannot add or edit a schedule profile from the Add/Edit Driver screen. To add or edit a schedule profile, refer to Section 8.3: Add or Edit a Schedule Profile.
- 14. Select the Starting Location tab.

Groups Schedule	Starting Location	Groups Schedu	le Starting Location
Select 💽 Landmark	Category O Single Landmark O None	Select 🔵 Landm	nark Category 💿 Single Landmark 🔘 None
Landmark Category:	Driver Home Address 🛛 🔻	Landmark:	Driver TX Tahoe
	Zones 🔺	Street:	580 Amistad Dr
	School		
	Driver Home Address	City:	Prosper
	Customer	State:	ТХ
	Employee Start Point 👻		
		Postal Code:	75078
		Country:	US

Figure 58: Add Driver Screen - Select Starting Location

- 15. Select a Start Location option (e.g., Landmark Category, Single Landmark or None).
- FleetOutlook uses the values entered on this tab to calculate start of day departure alerts.
- Select the **None** option if you do not use late departure alerts.
- Select the Landmark Category option, and then select the category from the drop-down list. Alerts trigger based on the landmark category selected.
- Select the **Single Landmark** option, and then select an existing landmark name from the drop-down list. The Landmark drop-down list displays all landmarks available to the group selected from the Enterprise Tree.
- 16. Click the **Add** button.
- FleetOutlook populates the driver on the Active tab.
- To assign the driver to a vehicle, refer to Section 7.3: Assign a Driver to a Vehicle.

9.3 ADD OR EDIT A SCHEDULE PROFILE

The Schedule Profile sub-tab enables you to create and manage workday profiles for the drivers in your fleet. Each Schedule Profile defines the working days and hours.

When creating schedule profiles, we recommend that you use naming conventions that sort alphabetically, keep the parts of the common name the same length for easing scrolling and apply a code for each division in your organization.

SAR HD 10:00 - 7:00 PM Mon, Tues, Wed, Sat
SAR HD 8:00 - 5:00 PM Mon - Fri
SAR HD 8:00 - 5:00 PM Sun - Thurs
SAR HD 8:00 - 5:00 PM Tues - Sat
SAR HD 8:00 - 7:00 PM Mon Wed Fri Sat
SAR HD 8:00 - 7:00 PM Mon, Thu, Fri, Sat
SAR HD 8:00 - 7:00 PM Mon, Thurs, Fri, Sat
SAR HD 8:00 - 7:00 PM Mon, Tue, Wed, Sat
SAR HD 8:00 - 7:00 PM Mon, Tues, Fri, Sat
SAR HD 8:00 - 7:00 PM Mon, Tues, Thurs, Fri
SAR HD 8:00 - 7:00 PM Mon, Wed, Fri, Sat
SAR HD 8:00 - 7:00 PM Sun - Wed

Figure 59: Schedule Profile Naming Convention Example

<u>Note:</u> If you have numerous schedule profiles to create, use the bulk upload feature located on the Active tab.

The benefit of utilizing schedule profiles in FleetOutlook includes:

- Assigning late departure alerts at the start of a workday. The schedule profile identifies the expected workday.
- Create unauthorized use alerts for off-hours use of the vehicle. The schedule profile establishes acceptable use time.
- Provides a reference point for Start of Day and End of Day events for such reports as the Driver Utilization Report.

To Add or Edit a Schedule Profile:

1. Select the **Drivers** tab, and then select the **Schedule Profiles** tab.

🗁 WRXMA Enterprise Group	Active (6) Recycle Bin Schedule Profiles (3)		
East Team	Schedule Profile	Last Modified By	Last Modified Date	
Implementation	M-F 6:30 - 6 EST	Keith Warren	02/02/2012 09:28 AM EST	
Installation	M-F, 7:00 - 4:00	John Ragan	01/16/2013 08:31 AM EST	
Marketing	M-F, 8:30 - 5:30	Paul LaVigne	01/21/2011 11:10 AM EST	
Morrow				
New Test				
V Derations				
Training				
Prod Mgmt				
🕨 📴 Requirements Team				
WRXMA Install				

Figure 60: Drivers - Schedule Profiles Screen

- 2. Click the **Add** button.
- The Add Schedule Profile screen displays.
- To edit an existing schedule profile settings, select the Schedule profile from the list, and then click the **Edit** button. The Edit Schedule Profile screen displays.

Add Sc	hedule Pro	ofile				
	Sch	edule Profile:	SAR HD 8:00-5:00 M-F		Eastern 🛛 🔻	
		Start		End		
	SUN	9 🛉 :	00 • AM •	5 🔺 : 00) v P M v	
\checkmark	MON	8 🔺 : (00 • AM •	5 🔺 : 00) • PM •	
\checkmark	TUE	8 🔺 : (00 • AM •	5 🛉 : 00) v PM v	
\checkmark	WED	8 🔺 : (00 • AM •	5 🔺 : 00) v PM v	
\checkmark	THU	8 🔺 : (00 • AM •	5 🔺 : 00) v PM v	
\checkmark	FRI	8 🔺 : (00 v AM v	5 🔺 : 00) v PM v	
	SAT	9 🔺 : (00 v AM v	5 🔺 : 00) v PM v	
				Add	Cancel	

Figure 61: Add Schedule Profile

- 3. Enter the name in the **Schedule Profile** field, and then select a **Time Zone** from the dropdown list.
- The Schedule Profile Name and Time Zone fields are required.
- 4. Select each **Day** check box to indicate the day is a workday, and then select the day's **Start** and **End** times from the drop-down lists.
- 5. Click the **Save** button.

9.3.1 ASSIGN A SCHEDULE PROFILE TO A DRIVER

Schedule profiles define the workday and hours for each driver assigned to the schedule profile within FleetOutlook. Using the Assign Schedule button on the Drivers tab, you can assign a schedule profile to one driver or multiple drivers at once.

<u>Note:</u> You can also assign a schedule profile to a single driver through the Schedule Profiles tab located within the Driver Settings.

To Assign a Schedule Profile to a Driver:

- 1. Select the **Drivers** tab, and then select the driver from the list.
- To assign multiple drivers to the same schedule profile, use the Shift key to select adjacent driver rows and the Ctrl key to select non-adjacent driver rows.

DEMO2 Base Group	Active (28) Rec	ycle Bin Schedu	Ile Profiles (6)						
🔻 🚞 DEMO2 Enterprise Group									
Asset	Filter Find	Driver ID	▼ contai	ns 🔻		Go Reset			
🕨 🧰 Landmark Services Div	Driver ID	First Name	Last Name	Display Name	Vehicle ID	ESN	Driver Category	2nd Driver Categor	Schedule Profile
R30 Turn-Based Upda	13084-01	Mary	Shull	VN-302 - Mary Shul	11M144	00000000133	Senior Technician		_MTWTF_ 8am - 4
WO Services Division	44122	Larry	Foote	BT-108 - Larry Foot	40U554	00000000111	Distribution		_MTWTF_ 8am - 4
DEMO2 Install	33037-01	Charles	Brewmeister	VN-323 - Charles B	31R297	00000000121	Supervisor		_MTWTF_ 9am - 5
	46339	Craig	Dewalt	PT-201 - Craig Dev	41Q642	00000000149	Supervisor		_MTWTF_ 9am - 5
	47078	Linda	Greenfield	PT-204 - Linda Gre	52N831	00000000101	Supervisor		_MTWTF_ 9am - 5
	11211	Brian	Hitchcroft	VN-312 - Brian Hitc	450103	00000000118	Supervisor		_MTWTF_ 12pm -
	66616	Lucian	Samosata	VN-328 - Lucian Sa	81H193	00000000107	Senior Technician		_MTWTF_ 8am - 4
	38210	Kenneth	Lead	VN-331 - Kenneth I	753844	00000000105	Supervisor		_MTWTF_ 9am - 5
	32298	Hattie	Opair	VN-319 - Hattie Op	61Z386	00000000125	Junior Technician		_MTWTF_ 9am - 5
	42644	Henry	Spiffter	BT-101 - Henry Spi	97Q340	00000000148	Senior Technician		_MTWTF_ 12pm - i
	54582	Jason	Taylor	BT-103 - Jason Tay	55K808	00000000144	Distribution		_MTWTF_ 9am - 5
	87728	Paul	Broadwell	VN-320 - Paul Broa	21D151	00000000126	Trainee		_MTWTF_ 8am - 4
	38949	Marcos	Imelda	BT-102 - Marcos In	68U993	00000000143	Junior Technician		_S_WT_S 11am - 7
	34515	Charlie	Batch	VN-327 - Charlie Ba	65Y171	00000000108	Senior Technician		_MTWTF_ 9am - 5
	44861	James	Harrison	BT-107 - James Ha	72V172	00000000130	Trainee		_MTWTF_ 8am - 4p
	13823	Ronald	Galbraith	VN-307 - Ronald G	34X832	00000000140	Trainee		_MTWTF_ 8am - 4

Figure 62: Drivers - Assign Schedule

2. Click the Assign Schedule button.

• The Assign Schedule Profile to Drivers screen displays.

Assign Schedule Pr	Assign Schedule Profile To Drivers									
Schedule Profile:	SAR HD 8:00-	Eastern								
	Start	End								
SUN										
√ MON	8:00 AM	5:00 PM								
√ TUE	8:00 AM	5:00 PM								
V WED	8:00 AM	5:00 PM								
V THU	8:00 AM	5:00 PM								
V FRI	8:00 AM	5:00 PM								
SAT										
	Assi	gn Cancel								

Figure 63: Assign Schedule Profile to Drivers Screen

- 3. Select a Schedule Profile from the drop-down list.
- FleetOutlook automatically selects the days and populates the start and end time fields based on the schedule profile selected.
- 4. Click the **Assign** button.
- FleetOutlook assigns the selected schedule profile to the driver.

9.4 ID BUTTONS

ID Buttons enable drivers to easily assign themselves to the vehicle they are operating. Each vehicle has a Key Reader connected to the CalAmp tracking device. When the driver enters a vehicle, they press the Keyfob against the Key Reader. This sends a message to FleetOutlook and automatically pairs the driver to that vehicle.

Flee		Devices (49) Vehicles (45) A	ssets (4) Drivers (33)	Users Groups (15)	Landmarks (77) Alerts	s (28) Roles Supp Video Trainin
DEMO2 Enterprise Group	Active (33) Recyc	le Bin Schedule Pro	files (7) ID Buttons (1)				
DEMO2 Install				_			
Reports	 Filter Find 	ID Button	contains 🛛 🔻	G	Reset		
TechConnect	ID Button	Driver ID	First Name	Last Name	Vehicle Name	Assigned Date	Assigned By
	CA0000178BD53501	Tin Cup	Roy	McIvoy	Joes car	04/30/2015 10:24 AM EL	Bob Reynolds

To Add or Edit an ID Button:

- 1. Select the **Drivers** tab, and then select the **ID Button** Tab.
- 2. Click the **Add** button.
- The Add ID Button screen displays. To edit an existing ID Button, select the ID Button from the Active list, and then click the **Edit** button. The Edit ID Button screen displays.

Add ID Button	>
ID Button	
Driver	(none) Assign Remove
Vehicle Name	
Assigned Date	
Assigned By	
	bbA

- 3. Enter the ID button number in the ID Button field
- 4. To assign a driver, select the **Assign** button and select the driver from the displayed list.

• If the driver is not in the list, the driver may reside in a different group or the driver may need to be created. Refer to Section 9.2: Add or Edit a Driver for step-by-step instructions.

ID Button Bulk Upload.

You can create and save numerous ID Buttons at once using FleetOutlook's Bulk Upload feature. Bulk Upload uses a CSV formatted file, which enables you to save numerous ID Buttons with a single action.

To Bulk Upload ID Buttons:

- 1. Select the ID Buttons tab, and then click the **Upload** button.
- The Upload ID Buttons screen displays.

pload	ID Buttons	
ile	DriverKeys.csv Browse Cancel Upload	
Inst	ructions and Templates Upload Status	
	Template must be in CSV format.	•
•		
•	Click the link beside template to view and download template for uploading multiple driver keys.	
•	Update the template and save to your computer as a CSV file format.	I.
•	Select browse button, locate the file and select the Upload button.	
ſemp	late(s): <u>ID Button(s)</u>	

- 2. From the **Templates** section, click a template link (e.g., ID Buttons(s)).
- 3. Navigate to where you want to store the template, and then click the Save button.
- 4. Open the downloaded ID Button template from the save location.

	А	В	С	D
1	Driver Key	Driver ID		
2	1234567890	Sample ID		
3				

- 5. Delete the sample row of information, and then add the ID Button numbers and driver ID's. Driver ID's are optional. Do not edit the column header names.
- If a required column is blank, the upload will fail.
- 6. Click the **Save** button.

• If you are using Microsoft Excel, you may receive a feature compatibility warning. Click the **Yes** button to keep the workbook in CSV format.



- Navigate back to **ID Button** tab in FleetOutlook Admin. If the Upload ID Button screen is not displayed, click the **Upload** button.
- 7. Click the **Browse** button to upload the saved bulk upload file.
- The Open dialog box displays.

	0 10 0 10 - 10 - 10 day = 10 -	- 30-Dev	nacio Poli Dicen	
🕒 💬 🗢 📙 🕨 Bulk	Upload TEMPLATES ID Button		✓ ♣ Search ID Butto	n 🔎
Organize 👻 Includ	de in library ▼ Share with ▼ New folder		855	• 🗌 📀
🚖 Favorites	A Name	Date modified	Туре	Size
Desktop Downloads Recent Places	DriverKeys	8/4/2015 2:02 PM	Microsoft Excel Co	1 KB
 Libraries Documents Music Pictures Videos 	5			
Komputer	· v			
1 item				Ŷ

Figure 64: Open Saved Asset Template

- 8. Select the saved bulk upload file, and then click the **Open** button.
- FleetOutlook automatically populates the **File** field of the Upload ID Button screen with the template name.

Upload ID Buttons		×
File DriverKeys.csv	Browse Cancel Upload	
Instructions and Templates	Upload Status	
• Template must be in CS	V format.	•
• ID Button is required field	d.	
• Driver ID references to e	xisting driver, not as new driver.	
 Click the link beside ten keys. 	plate to view and download template for uploading multiple driver	
Update the template and	d save to your computer as a CSV file format.	Н
Select browse button, loc	ate the file and select the Upload button.	•
Template(s): <u>ID Button(s</u>	<u>.)</u>	

Figure 65: Upload Saved Vehicle Data

- 9. Click the **Upload** button.
- FleetOutlook uploads the ID Buttons and displays the Upload Status tab.

Upload ID Buttons		×
File DriverKeys.csv	Browse Cancel Upload	
	Upload Status Rows uploaded: 1 tal Failed Rows: 0	
Success Failed		1
ID Button	Status	
1234571234567232	SUCCESS	
		_/

Figure 66: Upload Status Tab

- Each row represents a new ID Button. FleetOutlook indicates if the ID Button uploaded successfully or failed. For any ID Button that failed, you will have to fix the errors and re-upload them or create the ID Button manually within FleetOutlook Admin.
- 10. Click the **Close** button in the upper-right corner of the screen.

• FleetOutlook displays all successful ID Buttons on the Active tab.

9.5 DRIVER BULK UPLOAD

You can create and save numerous drivers at once using FleetOutlook's Driver Bulk Upload feature. Bulk Upload uses a CSV formatted file, which enables you to quickly save numerous drivers with a single action. FleetOutlook's Driver Bulk Upload feature is primarily used for the initial setup of FleetOutlook. FleetOutlook has three bulk templates: Drivers, Vehicle and Driver and Schedule Profiles.

Driver Bulk Upload Considerations:

- Use the Vehicles and Drivers template to create the vehicle and assign the driver to the vehicle at the same time.
- If you use the Vehicles and Drivers template, you will need to add vehicle supporting information manually. This information includes license plate, year make and model of the vehicle but the information is optional in FleetOutlook. See Add/Edit Vehicles help for more information. You may also bulk upload Vehicle information.
- If you upload drivers only, you need to pair drivers to vehicles manually.
- Setup all groups first, as this will allow you to upload drivers into specific groups.
- Before beginning the upload sequence, select the group you wish to place the drivers in during the upload. If you wish to have them placed in several groups, you will need to perform several uploads.
- If Driver ID already exists, active or retired, you will not be able to upload the driver.
- If the Vehicle ID already exists, and you are using the Vehicle and Driver upload file, you will
 not be able to upload the driver due to an error for the duplicate vehicle.
- FleetOutlook allows a bulk upload of driver or driver-vehicle pairings. This is primarily for the initial setup of FleetOutlook. If Vehicle IDs are already in FleetOutlook, you will not be able to pair drivers to vehicles using the upload. Pairings will need to be done manually.

To Bulk Upload Drivers:

1. Select the **Drivers** tab, and then select the **Active** tab.

DEMO2 Base Group	Active (9) Recyc	le Bin Schedu	e Profiles (6)						
🛛 🗁 DEMO2 Enterprise Group		(
Asset	 Filter Find 	Driver ID	▼ contai	ns 🔻		Go Reset			
▶ 🚞 Landmark Services Div	Driver ID	First Name	Last Name	Display Name	Vehicle ID	ESN	Driver Category	2nd Driver Categor	Schedule Profile
🗋 R30 Turn-Based Upda	13084-01	Mary	Shull	VN-302 - Mary Shul	11M144	00000000133	Senior Technician		_MTWTF_ 8am -
WO Services Division	33037-01	Charles	Brewmeister	VN-323 - Charles B	31R297	00000000121	Supervisor		_MTWTF_ 9am -
DEMO2 Install	11211	Brian	Hitchcroft	VN-312 - Brian Hitc	450103	00000000118	Supervisor		_MTWTF_ 12pm
	66616	Lucian	Samosata	VN-328 - Lucian Sa	81H193	00000000107	Senior Technician		_MTWTF_ 8am -
	87728	Paul	Broadwell	VN-320 - Paul Broa	21D151	00000000126	Trainee		_MTWTF_ 8am -
	35993-01	Kirsten	Paulandra	VN-306 - Kirsten Pa	46W297	00000000137	Trainee		_MTWTF_ 9am -
	88370	Anton	Desraili	VN-308 - Anton Des	34C902	00000000139	Senior Technician		_MTWTF_ 8am -
	43383-01	James	Quinton	BT-105 - James Qu	49W111	00000000146	Trainee	Class II Certified	_MTWTF_ 9am -
	87887	David	Brookings	VN-315 - David Bro	69J512	00000000113	Senior Technician		_MTWTF_ 8am -

Figure 67: Driver Bulk Upload

- 2. Click the **Upload** button.
- The Upload Drivers screen displays.

Upload Drivers	$\square \times$
File Browse Cancel Upload	
Upload Type Driver(s) Vehicle and Driver Driver Schedule 	
Instructions and Templates Upload Status	
Template must be in CSV format.	•
• Driver Id, Driver First Name, and Last Name are required fields to upload only driver details.	
 Driver Id, Driver First Name, Last Name, Vehicle Id, and Vehicle Name are required fields to upload driver with vehicle details. 	
 Existing Driver Id, and existing Schedule Profile Name are required fields to upload only driver schedules. 	
Click the link beside template to view and download template for uploading multiple drivers	
Update the template and save to your computer as a CSV file format.	•
Template(s): Driver(s) Vehicle and Driver Driver Schedule	

Figure 68: Upload Drivers Screen

- 3. From the Templates section, click a template link (e.g., Driver(s), Vehicle and Driver and Driver Schedule).
- 4. Navigate to where you want to store the template, and then click the **Save** button.
- 5. Open the downloaded Drivers template from the save location.
| А | В | С | D | E | F | G |
|------------|-------------------|------------------|--------------------|-----------|------------|----|
| Driver Id | Driver First Name | Driver Last Name | Driver Category Id | 2nd Drive | r Category | Id |
| John_Jones | John | Jones | Tech II | | | |
| | | | | | | |

Figure 69: Sample Template Data

- 6. Delete the sample rows of information, and then add the information for your drivers, vehicles or schedule profiles. Do not edit the column header names.
- If a required column is blank, the upload will fail.
- 7. Click the **Save** button.
- If you are using Microsoft Excel, you may receive a feature compatibility warning. Click the Yes button to keep the workbook in CSV format.

Microsoft	Excel
i	Landmarks.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format? • To keep this format, which leaves out any incompatible features, click Yes. • To preserve the features, click No. Then save a copy in the latest Excel format. • To see what might be lost, click Help.

Figure 70: Excel Warning Message

- 8. Navigate back to Drivers tab in FleetOutlook Admin.
- If the Upload Drivers screen is not displayed, click the **Upload** button.
- 9. From the Upload Drivers screen, select the Upload Type option.
- 10. Click the **Browse** button to upload the saved bulk upload file.
- The Open dialog box displays.

Organize 🔻 New folder				
A 🌟 Favolates	A Name	^	Date modifie	Drive Id,Dr er
〕 Downloads	🖳 Dri	vers	4/10/2013 11	First
 SOP SOP Videos 	E Vel	nicles	4/9/2013 11×	Name, iver Last Name, iver Catec y Id, d Dri r Cat ory I John_ n,Jor ,Tech II,
🛿 💻 Computer			 	

Figure 71: Open Driver Template

11. Select the saved bulk upload file, and then click the **Open** button.

• FleetOutlook automatically populates the File field of the Upload Drivers screen with the saved file name.

Upload Drivers	Π×
File Drivers.csv Browse Cancel Upload	
Upload Type Driver(s) Vehicle and Driver Driver Schedule 	
Instructions and Templates Upload Status	
Template must be in CSV format.	•
Driver Id, Driver First Name, and Last Name are required fields to upload only driver details.	
 Driver Id, Driver First Name, Last Name, Vehicle Id, and Vehicle Name are required fields to upload driver with vehicle details. 	
 Existing Driver Id, and existing Schedule Profile Name are required fields to upload only driver schedules. 	
Click the link beside template to view and download template for uploading multiple drivers	.
 Update the template and save to your computer as a CSV file format. 	•
Template(s): <u>Driver(s)</u> <u>Vehicle and Driver</u> <u>Driver Schedule</u>	

Figure 72: Upload Saved Driver Data

- 12. Click the **Upload** button.
- FleetOutlook uploads the drivers and displays the Upload Status tab.

Upload	d Drivers		□ ×
File	Drivers.csv	Browse Cancel Upload	
Uploa	d Type Driver(s) 	Vehicle and Driver O Driver Schedule	
Inst	ructions and Templates	Upload Status	
	Drivers.csv		
	Rows in File: 1 Total	Rows uploaded: 1 al Failed Rows: 0	
Su	ccess Failed		
Dri	iver Id	Status	
Joh	in_Jones	SUCCESS	

Figure 73: Driver Upload Status Tab

- Each row represents a new driver. FleetOutlook indicates if the driver uploaded successfully or failed. For any drivers that failed, you will have to fix the errors and re-upload them or create the driver manually within FleetOutlook Admin.
- 13. Click the **Close** button in the upper-right corner of the screen.
- FleetOutlook displays all successful drivers on the Active tab.

9.5.1 DRIVER TEMPLATE COLUMNS

The following table outlines all of the available columns in the Driver template. Required fields are in red font.

Column	Description				
Driver ID	The Driver ID must be a unique value. The field cannot contain spaces or commas. Underscores, periods and hyphens are acceptable. We recommend using a name that you can quickly identify with a driver. Do not use Vehicle ID.				
Driver First Name					
Driver Last Name					
Driver Category ID	The Driver Category fields identify your drivers by one or two				
2nd Driver Category ID	categories.				

9.5.2 VEHICLE AND DRIVER TEMPLATE COLUMNS

The following table outlines all of the available columns in the Vehicles and Drivers template. Required fields are in red font.

Column	Description
Vehicle ID	Must be a unique value. We recommend last 6-8 digits of VIN. If the Vehicle ID already exists in FleetOutlook, the upload for the vehicle/driver fails.
Vehicle Name	Vehicle Name is a required field and is used to identify the vehicle within the FleetOutlook application.
Driver ID	The Driver ID must be a unique value. The field cannot contain spaces or commas. Underscores, periods and hyphens are acceptable. We recommend using a name that you can quickly identify with a driver. Do not use Vehicle ID.
Driver First Name	
Driver Last Name	
Driver Category ID	The Driver Category fields identify your drivers by one or two
2nd Driver Category ID	categories.

9.5.3 DRIVER SCHEDULES TEMPLATE COLUMNS

The following table outlines all of the available columns in the Driver Schedules template. Required fields are in red font.

Column	Description
Driver ID	Must be an exact match the Driver ID in FleetOutlook. If the upload does not find the corresponding Driver ID, the upload for the selected driver fails.
Schedule Profile Name	Must be an exact match with the Schedule Profile Name in FleetOutlook. If the upload does not find an exact match, the upload fails or the incorrect schedule profile is assigned.

10 USERS

Access to FleetOutlook and FleetOutlook Admin is defined by a user profile and permissions. FleetOutlook Admin provides a list of standard roles with a default set of permissions assigned; however, you can customize the permissions available for each user in your organization. The role assigned to a user profile helps establish the basic permissions available to the user.

As you create users, remember that each user login must be unique within FleetOutlook. FleetOutlook is a Service as a Software (SaaS) application, so all enterprises share a common user list. We recommend you use each user's email address as their FleetOutlook username.

Note: The number of users displayed depends on the group selected from the Enterprise Tree.

DEMO2 Base Group	-					
DEMO2 Enterprise Group	Filter O Find	User Login 🔹	contains 🔻	Go Res	et	
Asset	Jser Login	First Name	Last Name	Employee ID	Role	Password Status
▶ 🚞 Landmark Services Div a	lan.hardy@cityc	Alan	Hardy	City of Tacoma	View	ок
R30 Turn-Based Upda b	obte	b	t		View	OK
▶ 🦳 WO Services Division b	ouffaloemilling@	Christine	Spencer	Buffaloe Milling	View	ок
DEMO2 Install ca	arl@expertpest(Carl	Hollins	Expert Pest Control	View	ок
cj	jr@altexsystem:	Altex System	Altex System	Altex System	View	ок
c.	ontrol.systems	Control	Systems		Demo	OK
d	lemo2_admin	DEMO2 Base	Administrator		GADMN	ок
d	iemo2_test	test	user		EADMN	ок
d	lemocalamp	Cal	Amp		View	ок
d	lerek.stine	Derek	Stine		Demo	ок
d	ioney_7@hotma	Johnny	Doney	Trial	View	ок
e	edj@summitnw.c	Ed	Jones	Summit NW Corp	Landm	ок
jla	awless	Justin	Lawless	WNECA	View	ок
k	stauty	Karl	Stauty	Commercial Power Sweeping	View	ок
	nathurs@pacbel	Vconnekt	Mathurs	Vconnekt	View	ок
п	nikev@showmer	Mike	Valade		View	ок
m	nyServiceDemo	myService	Demo		Demo	ок
	laviane demo	Devil	LaVigne		FADMN	OK

Figure 74: Users Screen

10.1 USER ADMIN OPTIONS

The buttons displayed at the bottom of the Users tabs enable you to quickly modify user settings for a single user or multiple users at once. To modify the settings for more than one user at a time, use the Shift key to select adjacent user rows and the Ctrl key to select non-adjacent user rows, and then click the appropriate action button.



Figure 76: User - Inactive Tab Options

- Add Add a new user.
- Edit Edit the properties of the selected user.
- **Change Group** Displays the Change Group screen and enables you to move the selected user(s) from one group to another.
- **Upload** Displays the Bulk Upload screen and enables you to create multiple users with a single action.
- **Deactivate** Removes the selected user(s) from the Active tab and stores the selected user(s) on the Inactive tab. Inactive users do not have login access to FleetOutlook or FleetOutlook Admin. You cannot permanently remove users from FleetOutlook. Inactive users always display on the Inactive list.
- **Login History** Displays the User Login History screen. You can export the data to a CSV file to analyze number of logins, number of failed logins and which application.
- Audit You can access user history for a selected user by clicking the Audit button. The User History screen displays important information about the record change history including when it was edited, who edited it and what valued was changed.
- Activate Only available on the Inactive tab. The Activate option enables you to activate a previously deactivated user. Once you have reactivated a user, they will have access to FleetOutlook according to their assigned role and permissions.

10.2 ADD/EDIT A USER

Create user profiles to enable access to FleetOutlook and determine the level of permission each user receives. You can assign each user to all available groups or to only specific groups, which will limit the FleetOutlook data display to only the specified groups.

Add/Edit a FleetOutlook User:

1. Select the select **Users** tab.

DEMO2 Base Group	 Filter Find 	d User Login 🛛 🔻	contains 🛛 🔻	Go	Reset	
Asset	User Login	First Name	Last Name	Employee ID	Role	Password Status
🔻 🚞 Landmark Services Div	Demo2TestUser	Jack	Smith	Employee 1	View	ок
Business Services	Demo2TestUser:	John	Jones	Employee 2	View	ок
Residential Service:	Demo2TestUser:	James	Parker	Employee 1	View	ок
🗋 R30 Turn-Based Upda	Demo2TestUserl	Jack	Smith		View	ок
WO Services Division	Enterprise.Admir	Enterprise	Admin	23456	EADMN	ок
DEMO2 Install	Maintenance.Ma	Maintenance	Manager	34532	MnMgr	ок
	Maintenance.Sho	Mike	Mechanic	98589	Maint	ок
	Matt_Miller	Matt	Miller		TEST	ок
	PMSetup	Program	Management		EADMN	ок
	PenguinDataXML	Penguin	Data		View	ок
	QA	Quality	Assurance		View	ок
	SalesTeam	keith	Warren		View	ок
	Sam.Supervisor	Sam	Supervisor	65485	SUPVR	ок
	Silver1	Silver	Demo		Demo	ок
	SkyGuard	Sky	Guard		EADMN	ок
	Test View/Demo	Test	View or Demo		View	ок
	Tom.ray@verizor	Tom	Ray	Verizon Wireless	View	ок

Figure 77: Active Users – Add New User/Edit Existing User

- 2. Click the **Add** button.
- The Add User screen displays.
- To edit an existing user's settings, select the user from the Active list, and then click the **Edit** button. The Edit User screen displays.

Add User						Π×
		Preferences	Access Co	ontrol	Password	Groups
Login Username	bob_Smith@yourfleet.com					
First Name	Bob	Units of Mea	surement (SI/Eng	lish 🛛 🔻	
Last Name	Smith	Aut	o Refresh	15 min	•	
E-Mail	bob_smith@yourfleet.com			Disable	d	
				5 min		
Employee ID				15 min		
				30 min		
Default Group	WRXMA Enterprise Group Assign]		60 min		
						Add

Figure 78: Add User Screen

3. Enter the Login Username.

- The Login Username must be a unique value throughout FleetOutlook. We recommend using the user's email address.
- 4. Enter the user's First Name and Last Name in the respective fields.
- 5. Enter the user's **E-mail** address.
- FleetOutlook communication, and forgotten passwords are sent to this email address.
- 6. Enter the user's **Employee ID**.
- This field is a unique identifier for each employee and cannot contain duplicates. This field is not required.
- 7. On the Preferences tab, select a Units of Measurement from the drop-down list.
- SI/English is the default option. Use SI/English for all customers except Canadian customers and special requests.
- 8. Select an Auto Refresh value from the drop-down list.
- The recommended value is 15 minutes. Rapid refresh rates disrupt the FleetOutlook screen while data downloads, so refresh rates should only be as frequent as the user requires.
- 9. Select the Access Control tab.

ld User						
Last Name E-Mail Employee ID	Bob Smith bob_smith@yourfleet.com	Assign	Use FI T T M FI	r eetOutlook echDirect echConnect anage eetOutlook Admin	Password	Groups

Figure 79: Add User - Access Control

10. Select the user's **Role** from the drop-down list.

- Refer to, refer to Section 13: Roles for a detailed description each role.
- 11. Check the appropriate checkbox for each module to which the user needs access:
- FleetOutlook- Gives access to FleetOutlook. This option is required.
- **TechDirect** Only give access to TechDirect if you utilize the TechDirect module.
- TechConnect Only give access to TechConnect if you utilize the TechConnect module.
- **Manage** Select for those users who need to modify driver settings or change driver-tovehicle assignments. The Manage tab within FleetOutlook allows users with the appropriate roles to make these changes without accessing FleetOutlook Admin.

- FleetOutlook Admin Select only for those users that need permissions to manage and modify FleetOutlook components.
- Vehicle Maintenance Select only for those users that need permissions to manage or monitor the fleet maintenance schedule.
- 12. Select the **Password** tab.

Add User								×
			Preferences	Access	Control	Password	Groups	
Login Username	bob_Smith@yourfleet.com							
First Name	Вор		New F	Password	*****			
Last Name	Smith		New Password	l (again)	*****			
E-Mail	bob_smith@yourfleet.com				🗸 Is Te	emporary		
Employee ID			Minimum pas	sword leng	gth is 6 ch	aracters		
Default Group	WRXMA Enterprise Group	Assign						
							Add)

Figure 80: Add User - Password

- 13. Enter a temporary password for the customer in both the **New Password** and the **New Password (again)** fields.
- Minimum password length is 6 characters.
- 14. Check the **Is Temporary** checkbox.
- This field prompts the user to change the password at the next login.
- 15. Select the Groups tab.

ld User			((-	
Login Username First Name Last Name E-Mail Employee ID	bob_Smith@yourfleet.com Bob Smith bob_smith@yourfleet.com		Preferences	Access Control	Password	Groups
Default Group	WRXMA Enterprise Group	Assign	bbA			Remove

Figure 81: Add User - Groups

16. Click **the** Add button located on the lower-left side of the Groups tab.

• Verify that you clicked the Add button associated with Groups tab and not the Add button for the Add User screen.

- To remove a Group from the user's profile, select the Group and then click the Remove button.
- The Choose Groups screen displays.
- The Enterprise Tree displays on the far left. The groups currently assigned to the vehicle in the middle and a list of available groups on the far right.

Choose Groups:						$\Box \times$
🔻 🗁 WRXMA Enterprise Group	•		Assigned 🔸	1	Unassigned	
East Team		L	Prod Mgmt		Base Camp	
Exec Team		L	WRXMA Enterprise Group		East Team	
Implementation		L			Exec Team	
Installation		L			Implementation	
Marketing		L		< Add	Installation	
Morrow	≣	I.		Remove >	Installation	
New Test		ľ		<< Add All	Marketing	≣
🔻 🚞 Operations					Morrow	
Training				Remove Al	New Test	
Prod Mgmt					Operations	
🔻 🚞 Requirements Team					Requirements Team	
Base Camp		1			Technical Development	
Installation					Training	
De l'in l	•					
					ОК Са	incel
						/

Figure 82: Assign Groups

- 17. Select a Group form the **Unassigned** list, and then click the **< Add** button.
- You can add multiple groups at once. Use the Shift key to select adjacent groups and the Ctrl key to select non-adjacent groups.
- 18. Click the **OK** button.

Add User					Π×
		Preferences	Access Control	Password	Groups
Login Username	bob_Smith@yourfleet.com	Prod Mgmt			
First Name	Bob	WRXMA Enterpr	ise Group		
Last Name	Smith				
E-Mail	bob_smith@yourfleet.com				
Employee ID					
Default Group	WRXMA Enterprise Group Assign				
		Add			Remove
				1000	Add

Figure 83: Add User - Assign Default Group Option

- 19. Click the **Assign** button for the **Default Group** field.
- The Change Selection screen displays.

Change selection	$\square \times$
🔻 🗁 WRXMA Enterprise Group	
East Team	
Exec Team	
Implementation	
Installation	
Marketing	
Morrow	
New Test	
▼ 🔁 Operations	
Training	
Prod Mgmt	
🕨 🚞 Requirements Team	
WRXMA Install	
OK Cane	cel //

Figure 84: Select Default Group

20. Select the **Default Group** for the user, and then click the **OK** button.

- You can only assign a default group to a user if you have assigned that group to the user on the Groups tab.
- The default group loads when the user logs in to FleetOutlook. Define as small as a default group as possible, as this allows for faster data download and refresh. The user can always select a larger group after they log in to the application.

Add User						Π×
			Preferences	Access Control	Password	Groups
Login Username	bob_Smith@yourfleet.com		Prod Mgmt]
First Name	Bob]	WRXMA Enterpri	ise Group		
Last Name	Smith					
E-Mail	bob_smith@yourfleet.com]				
Employee ID]				
Default Group	Prod Mgmt	Assign				
			Add		(Remove
						Add

Figure 85: Add User Screen Complete

- 21. Click the **Add** button at the lower-right of the Add User screen.
- FleetOutlook adds the user to the Active list.
- The user will have immediate access to FleetOutlook according to the assigned role and permissions.

10.3 USER BULK UPLOAD

You can upload and create numerous user profiles at once using FleetOutlook's Bulk Upload feature. Bulk Upload uses a CSV formatted template, which enables you to quickly create multiple FleetOutlook user profiles with a single action.

You must download the template to your local computer in order to bulk upload the user profiles. The template contains three sample rows of data. Delete these rows prior to uploading the template to FleetOutlook. After you add all user information, save the file with the existing file name and CSV format.

To Bulk Upload Users:

1. Select the **Users** tab.

DEMO2 Base Group	💿 Filter 🔵 Fin	d User Login 🛛 🔻	contains 🔻	Go	eset	
DEMO2 Enterprise Group					Role	Password Status
Asset	User Login	First Name	Last Name	Employee ID		
🔻 🚞 Landmark Services Div	Demo2TestUser		Smith	Employee 1	View	ок
Business Services	Demo2TestUser:	John	Jones	Employee 2	View	ок
Residential Service:	Demo2TestUser	James	Parker	Employee 1	View	ок
📄 R30 Turn-Based Upda	Demo2TestUser	Jack	Smith		View	ок
WO Services Division	Enterprise.Admir	Enterprise	Admin	23456	EADMN	ок
DEMO2 Install	Maintenance.Ma	Maintenance	Manager	34532	MnMgr	ок
	Maintenance.Sho	Mike	Mechanic	98589	Maint	ок
	Matt_Miller	Matt	Miller		TEST	ок
	PMSetup	Program	Management		EADMN	ОК
	PenguinDataXML	Penguin	Data		View	ок
	QA	Quality	Assurance		View	ок
	SalesTeam	keith	Warren		View	ок
	Sam.Supervisor	Sam	Supervisor	65485	SUPVR	ок
	Silver1	Silver	Demo		Demo	ок
	SkyGuard	Sky	Guard		EADMN	ок
	Test View/Demo	Test	View or Demo		View	ок
	Tom.ray@verizor	Tom	Ray	Verizon Wireless	View	ОК

Figure 86: User Bulk Upload Option

- 2. Click the **Upload** button.
- The Upload Users screen displays.

Ipload Users	c
īle	Browse Cancel Upload
Instructions and Templates	Upload Status
	V format. isword,First Name,Last Name,User RoleType, and Email are required field plate to view and download template for uploading multiple users.
 Select browse button, loc 	d save to your computer as a CSV file format. ate the file and select the Upload button.
New User will be displaye Template(s): User(s)	d under assigned groups in Users list.

Figure 87: Upload Users Screen

- 3. Click the **Users** template link at the bottom of the screen.
- 4. Navigate to where you want to store the template, and then click the **Save** button.
- 5. Open the downloaded Users template from the save location.

	Α	В	С	D	E	F	G	Н	1	J	K	L	М	N
1	User Logir	Password	First Nam	Last Name	Email	Employee	Default Gr	Unit Of M	Auto Refr	Default Ro	Enable Fle	Enable Da	Enable Te	Enable FQ
2	bob_jone:	123456	Bob	Jones	bob_jone:	s@testflee	13794	SI/English	15 MIN	User	Y	N	N	N
3														

Figure 88: User Bulk Upload Template

- 6. Delete the sample rows of information, and then add the information for your user profiles. Do not edit the column header names.
- If a required column is blank, the upload will fail.
- 7. Click the Save button.
- If you are using Microsoft Excel, you may receive a feature compatibility warning. Click the Yes button to keep the workbook in CSV format.

Landmarks.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format? • To keep this format, which leaves out any incompatible features, click Yes. • To preserve the features, click No. Then save a copy in the latest Excel format. • To see what might be lost, click Help.	Microsoft	Excel
Yes No Help	1	To keep this format, which leaves out any incompatible features, click Yes. To preserve the features, click No. Then save a copy in the latest Excel format. To see what might be lost, click Help.

Figure 89: CSV File Format Warning

- 8. Navigate back to Users tab in FleetOutlook Admin.
- If the Upload Users screen is not displayed, click the **Upload** button.

- 9. From the Upload Drivers screen, click the **Browse** button to upload the template.
- 10. The Open dialog box displays.

🕘 Open	×
🕞 🗢 🖳 🕨 Amy Platt 🔸 Downloads	- 4, Search Downloads
Organize 🔻 New folder	** - 🚺 📀
 ★ Favorites ▶ Downloads ₩ Recent Places ■ Desktop 	▲ 전값 Drivers 전값 Users 전값 Vehicles
 □ Libraries □ Documents → Music □ Pictures □ SOP □ Videos 	
E Computer	
File name: Users	◆ Documents (*.csv) ◆ Open ← Cancel

Figure 90: Open User Template

11. Select the saved bulk upload file, and then click the **Open** button.

Upload	Users		Π×
File	Users.csv	Browse Cancel Upload	
Inst	ructions and Templates	Upload Status	
•	Template must be in CS Login Username, Login Pa:	iV format. ssword,First Name,Last Name,User RoleType, and Email are requi	red fields.
•		nplate to view and download template for uploading multiple (d save to your computer as a CSV file format.	users.
•	Select browse button, loo	cate the file and select the Upload button.	
•	New User will be displaye	ed under assigned groups in Users list.	
Temp	olate(s): <u>User(s)</u>		

Figure 91: Upload User Template

12. Click the **Upload** button.

• FleetOutlook uploads the users and displays the Upload Status tab.

	sers		
ie U	lsers.csv	Browse Cancel Upload	
Instruc	ctions and Templates	Upload Status	
	ows in File: 1 Total uccess Rows: 1 Tot ess Failed		
otal Su	ess Failed		
otal Su Succe User I	ess Failed	tal Failed Rows: 0	
otal Su Succe User I	uccess Rows: 1 To ess Failed Id	tal Failed Rows: 0 Status	
otal Su Succe User I	uccess Rows: 1 To ess Failed Id	tal Failed Rows: 0 Status	
otal Su Succe User I	uccess Rows: 1 To ess Failed Id	tal Failed Rows: 0 Status	

Figure 92: User Upload Status Tab

- Each row represents a user. FleetOutlook indicates if the user uploaded successfully or failed. For any users that failed, you will have to fix the errors and re-upload them or create the user manually within FleetOutlook Admin.
- 13. Click the **Close** button in the upper-right corner of the screen.
- FleetOutlook displays all successful new users on the Active tab.
- The user will have immediate access to FleetOutlook according to the assigned role and permissions.

10.3.1 USER TEMPLATE COLUMNS

The following table outlines all of the available columns in the bulk upload template. Required fields are in red font.

Column		Description				
User Login		Must be a unique value in FleetOutlook. We recommend you use each user's email address.				
Password		Must be between 6	6-32 characters.			
First Name						
Last Name						
Email			on with the Forgot Pas rd is sent the email ad			
Employee ID						
Default Group ID		Group ID Number	(see Group Admin tab	, fir	st column).	
	Name Prod M	lgmt	Parent Group WRXMA Enterprise Group		Exclusive Group	-
Unit Of Measurement		SI/English or Metric; Default = Metric				
Auto Refresh Rate		Disabled or 5 min,	15 min, 30 min or 60 i	min	; Default = 5 r	nin
Default Role Type Code		Select from the roles for your enterprise. Typical EADMN, GADMN, User, EUser.				
Enable FleetOutlook YN		Y or N; Default = Yes				
Enable Dashboard YN		Y or N; Default = Yes				
Enable TechConnect YN		Y or N; Default = No				
Enable FO Admin YN		Y or N; Default = No				
Enable Manage YN		Y or N; Default = No				
Enable Vehicle Maintenance	'N	Y or N; Default = No				
Temporary Password YN		Y or N; Default = N	lo			

11 GROUPS

Groups organize your FleetOutlook components into a hierarchy that mirrors your organizational structure. FleetOutlook groups allow for up to 8 levels, which helps you to identify the depth of your structure. Within each level, you can create an unlimited number of groups, and each group can have an unlimited number of sub-groups. We recommend creating a group structure for fleets with 15 or more vehicles.

Note: Creating the FleetOutlook Group structure is typically done by your Implementation Specialist during FleetOutlook deployment. If you have a question about your FleetOutlook groups, contact the FleetOutlook Customer Care Team.

FleetOutlook has two types of groups:

- Exclusive Groups An Exclusive Group name defines the level on which the group resides on the hierarchy tree. For example, you can organize your exclusive groups geographically such as Region (Level 1 – Northeast, Southeast, etc.) and then State (Level 2 – Wisconsin, Ohio, etc.). Vehicles can only belong to one Exclusive Group, and to assign a driver to a vehicle they have to belong to the same exclusive group. Creating the proper exclusive group structure is critical to the integrity of FleetOutlook report data.
- Non-Exclusive Groups Non-exclusive groups are used for purposes other than maintaining the report data integrity. For example, non-exclusive groups enable you to create a group for a set of vehicles, and then assign a alert for just that group of vehicles. Unlike exclusive groups, a FleetOutlook component can belong to any number of nonexclusive groups.

Common uses for groups:

- Assign Users to only the group(s) to which they need access.
- Using the Group Selector option in FleetOutlook, you can filter the data displayed on any tab to a specific group. You cannot filter the Reports tab, as each report contains its own group filter.
- Using groups allows you to analyze group-by-group comparisons in FleetOutlook reports. For example, you can run the Idle Report and compare the total idle for each group in the Region level of your group hierarchy.
- You can run a report that displays both exclusive and non-exclusive groups in the output. A
 vehicle's data may appear two or more times in the report data; however, the average and
 summary values use only exclusive group data.
- By assigning alerts and landmarks to a specific group, they will only trigger for the vehicles in the group.

11.1 GROUP HIERARCHY

By default, each FleetOutlook enterprise has two groups: Enterprise group and Install group. The Enterprise group is the top level in the organizational structure and the starting point of creating your organization's group hierarchy.

The Install group contains all of your unassigned devices. As soon as you assign a device to a vehicle, the device is moved to the same exclusive group as the assigned vehicle. There is minimal use of this group after the initial installation. If you remove a device-to-vehicle assignment, the device automatically resides back in the Install group. Depending on your user role and permissions, you may not have access to the Install group.

The example below shows the Groups screen with four levels of exclusive groups.

Groups Hierarchy		
Level	Name	Count of Groups at Level
Level-1	Enterprise	0
Level-2	Division	0
Level-3	Manager	0
Level-4	Supervisor	0
Level-5		0
Level-6		0
Level-7		0
Level-8		0

Figure 93: FleetOutlook Group Structure Example

11.2 ADD AN EXCLUSIVE GROUP

Exclusive Groups are used to divide large numbers of vehicles into smaller groups for reporting, security, alerts, landmark detection, and to prevent duplication of FleetOutlook data.

To Add an Exclusive Group:

- 1. Select the Groups tab.
- 2. Select the Parent group from the Enterprise Tree. If you have never created groups, you will only see the default Enterprise Group.
- FleetOutlook displays the selected group and any sub-groups to the right of the Enterprise Tree.

WRXMA Enterprise Group	Filter O Find ID	contains v	Go Reset		
Exec Team	ID	Name	Parent Group	Exclusive Group	Last Modified
Implementation	14132	Operations	WRXMA Enterprise Group	Level 2	04/10/2013 10:47 AM EDT
Installation	52520	Training	Operations	Level 3	04/10/2013 10:48 AM EDT
Marketing					
Morrow					
New Test					
🗁 Operations					
Training					
Prod Mgmt					
🔁 Requirements Team					
Base Camp					
Installation					
Technical Developmen					
WRXMA Install					
	2				

Figure 94: FleetOutlook Groups Screen

- 3. Click the Add button.
- The Add Group screen displays.

Add Group	
Enterprise Code Parent Group Name Exclusive Group Time Zone Automatically adjust for Daylight Savings changes?	WRXMA Operations Training Level 2 V Eastern V
	Add

Figure 95: Add Group Screen

- 4. Enter the group **Name**.
- 5. Select the **Exclusive Group** from the drop-down list.

- Each Exclusive Group name refers to a level of group hierarchy.
- In the above example, if you assign Roadside Assistance to Level 2, the group will reside on the same level as the Operations group, Product Mgmt group and the Requirements Team group. If you assign Roadside Assistance to Level 3, the group will reside on the same level as the Training group, Base Camp group, etc.
- 6. Select the group's **Time Zone** from the drop-down list.
- 7. Using the Time Zone property, you can set the time zone for each group in your hierarchy to reflect the group's geographic location. This option is specifically for FleetOutlook Analytics users to compare work time data equally across multiple time zones.
- 8. Click the **Add** button.
- FleetOutlook adds the Exclusive Group to the group hierarchy. Select the new group from the Enterprise Tree and add any vehicles, drivers, users, alerts or landmarks to the group.

Find					Video Training
🔻 🚞 WRXMA Enterprise Group	Filter Find ID	▼ contains ▼	Go Reset		
East Team	ID	Name	Parent Group	Exclusive Group	Last Modified
Exec Team	14132	Operations	WRXMA Enterprise Group	Level 2	04/10/2013 12:05 PM EDT
Implementation	62109	Roadside Assistance	Operations	Level 3	04/10/2013 03:03 PM EDT
Installation	52520	Training	Operations	Level 3	04/10/2013 10:50 AM EDT
Marketing					
-					
New Test					
Operations					
Roadside Assistance					
Training					
Prod Mgmt ▼ 🗁 Requirements Team					
Base Camp					
Installation					
Technical Developmen					
WRXMA Install					
	Add Edit Deactivate	Audit			

Figure 96: New Group Added - Example

12 LANDMARKS

Locations or points of interest are instrumental to the successful management of your fleet. Define landmarks to serve as visual reference points on FleetOutlook maps, trigger locationbased alerts, identify work stops or classify off-limit locations or restricted areas.

Landmarks are assigned to a group within your FleetOutlook group structure. There are no limits to the number of groups to which a landmark can belong. When you place a landmark in a group, it becomes visible in FleetOutlook to any user who has selected to view that group or any group below in the hierarchy. You can copy or move landmarks to any other group in the group structure.

Note: You can associate landmarks with a specific group. Select the group from the Enterprise Tree, and then select the Landmarks tab. This is useful if you want to create a landmark for only specific vehicles or drivers.



Figure 97: Landmarks Screen

12.1 LANDMARK TYPES

FleetOutlook three landmark types. Refer to the following descriptions to understand which landmark will best suit your need.

12.1.1 CIRCLE LANDMARKS

Circle landmarks are the easiest landmark to create in FleetOutlook Admin. Circle landmarks have a center point and a radius. Create a circle landmark if you are not concerned with marking the exact boundaries of a location.

12.1.2 POLYGON LANDMARKS

Polygon landmarks are the most popular because they enable you to set the landmark to the exact perimeter. A polygon landmark always has an anchor point and a series of points that define the perimeter.

12.1.3 PLACE NAME LANDMARKS

Place Name landmarks relate to a jurisdiction or ZIP code. Place Name landmarks help define sales territories or service zones because you can quickly define an area by city and state combinations or even just a ZIP code. You can only create Place Name landmarks through the Add Landmark screen.

12.2 ADD A LANDMARK

FleetOutlook provides three methods to add a landmark. If you want landmark to apply to your entire fleet, select the Enterprise Group, and then create the landmark. If you want to create a landmark for a specific group, select the group and then create the landmark.

Three Add Methods:

- On Screen Add
- Landmark Add Screen
- Bulk Upload

FleetOutlook allows you to create a landmark using a specific address as the anchor point. This is a quick and easy way to create a landmark for a supply yard or parking lot. Enter the address in the Search field on the map, and then create the landmark using either the Polygon button or the Circle button located in the upper-left corner of the Landmark map.

Note: When you create a Landmark by entering an address in the Add Landmark dialog box, FleetOutlook automatically places the landmark's anchor point at the physical location of the address, which is typically the street. If your landmark radius or perimeter does not cover the entire property, vehicles may arrive and depart the landmark without detection.

Create an Address Landmark:

- 1 Select the highest-level group of the Enterprise hierarchy to which you want to configure the landmark.
- • All vehicles in the selected group and any group below will have the landmark available.
- 2. Select the Landmarks tab.
- 3. Type the landmark address in the **Search** field (e.g., 13645 Dulles Technology Drive, 20171).
- 4. Click the **Search** button or press the **Enter** key.
- FleetOutlook automatically centers the map and places a push pin at the physical location of the address.
- 5. In the example below, the physical location on the address is located on the street.
- 6. Click the **Satellite** button.

• In the example below, the physical location on the address is located on the street.



Figure 98: Landmark Anchor Point

- 9. Click the **Satellite** button.
- The Satellite button is a toggle button. When the map is in Satellite view, you see the Map button.
- 10. Zoom the map to a level that displays the entire physical property.
- 11. Click the **Polygon** button or the **Circle** button, and then click on the map to place the landmark.
- Verify that the landmark covers the entire landmark property and not just the anchor point.
- 12. Click the Add Landmark option on the map.
- The Add Landmark screen displays.

d Landmark				
Name	Herndon Office		Anchor Point	
Shape	Circle Polygon	Place Name	 Address Lat/Lon 	
andmark Category	Offices	•	Street Number	
Icon	Default	I T	Street Name	
Vertices	Lat	Lon	City	
	38.95807374397608	-77.41154548300001	State Zip	
	38.95419589530684	-77.41154548300001	Country	
	38.95419589530684	-77.421545483		
	38.95807374397608	-77.421545483		
	Add	Remove		
/orksite Landmark	\checkmark	Exclude from colocations		
GeoFence (no stop r	equired)			
			Show on Map Si	ave As New
				ive As new

Figure 99: Add Landmark Screen

- 13. Enter a descriptive Name for the landmark (e.g., Herndon Office).
- 14. The name appears on the map and any alerts. A short and easily understood name is best.

- 15. Select a **Landmark Category** from the drop-down list of previously created categories or create a new category.
- The Name and Landmark Category fields are required.
- 16. If needed, select an Icon from the drop-down list.
- 17. If appropriate, check the **Worksite Landmark** checkbox.
- A Worksite Landmark will display in the Gantt chart of TechDirect in FleetOutlook and will appear as a grey bar, identifying when the vehicle arrived and departed the landmark. This is useful for vehicles that may not have work orders assigned and will show their day as they move from worksite to worksite.
- 18. If appropriate, check the **GeoFence** checkbox.
- A GeoFence landmark does not require a stop or ignition off event to trigger landmark detection. Useful to identify locations that do not require a stop event.
- 19. If appropriate, clear the **Exclude from colocations** check box.
- The Exclude from colocations option only displays if your Enterprise has colocation enabled. All FleetOutlook landmarks are excluded from colocation reporting by default. FleetOutlook records colocation events when two or more vehicles are detected at the same location for more than the specified work stop duration. To enable colocation reporting for your enterprise, contact Customer Support by phone 1.866.456.7522 or by email solutionsupport@calamp.com.
- 20. Click the Save As New button.
- FleetOutlook creates the landmark and displays it on the Active tab.

12.3 DEFINE PLACE NAME LANDMARKS

Place Name landmarks allow you to define a geographic region as a landmark without drawing polygon vertices or adding an exact address. A Place Name landmark relates to a jurisdiction or ZIP code. FleetOutlook triggers landmark arrival or departure when the reported event location for a vehicle matches the defined place name value (e.g., 20171 or Herndon, VA).

Valid place names are:

- City, State combination
- County, State combination
- State (no city or county specified)
- ZIP Code

Create a Place Name Landmark:

- 1. Select the highest-level group of the Enterprise hierarchy to which you want to configure the landmark.
- All vehicles in the selected group and any group below will have the landmark available.
- 2. Select the Landmarks tab, and then click the Active sub-tab.
- 3. Click the **Add** button at the bottom of the screen.

To edit a landmark, select the landmark from the list, and then click the Edit button.

Add Landmark		□×
Name Shape Landmark Category	Place Name Landmark - City State Circle Polygon Place Name Zones	Place Name City Madison County
Icon	Default 🔹	State WISCONSIN V Zip
Worksite Landmark GeoFence (no stop re	Exclude from colocations	Country USA V
		Show on Map Save As New

Figure 100: Place Name Landmark Option

- 4. Enter a descriptive Name for the landmark.
- The name appears on the map and any alerts. A short and easily understood name is best.
- 5. Select a **Shape** option (e.g., **Place Name**).
 - Circle Center point and radius.
 - **Polygon** Anchor point and a series of points that define the perimeter.
 - Place Name Relates to a jurisdiction or ZIP code.
- 6. Select a **Landmark Category** from the drop-down list of previously created categories or create a new category.

- 7. Select an **Icon** from the drop-down list.
- This icon displays as the landmark placeholder on the map.
- 8. If appropriate, check the **GeoFence** checkbox.
- A GeoFence landmark does not require a stop or ignition off event to trigger landmark detection. Useful to identify travel to locations that do not require a stop event.
- 9. If appropriate, check the **Worksite Landmark** checkbox.
- A Worksite Landmark will display in the Gantt chart of TechDirect in FleetOutlook and will appear as a grey bar, identifying when the vehicle arrived and departed the landmark. This is useful for vehicles that may not have work orders assigned and will show their day as they move from worksite to worksite.
- 10. If appropriate, check the **GeoFence** checkbox.
- A GeoFence landmark does not require a stop or ignition off event to trigger landmark detection. Useful to identify locations that do not require a stop event.
- 11. If appropriate, clear the **Exclude from colocations** check box.
- The Exclude from colocations option only displays if your Enterprise has colocation enabled. All FleetOutlook landmarks are excluded from colocation reporting by default. FleetOutlook records colocation events when two or more vehicles are detected at the same location for more than the specified work stop duration. To enable colocation reporting for your enterprise, contact Customer Support by phone 1.866.456.7522 or by email solutionsupport@calamp.com.
- 12. Click the **Show on Map** button.

Address Correct?			
Match %	Address		
100	Madison Dane, WI		
		Yes No	

Figure 101: Confirm Place Name Settings

- 13. Click the Yes button to confirm address match.
- Once the address is confirmed, the Save As New button is enabled.
- 14. Click the Save As New button.
- FleetOutlook creates the landmark and displays it on the Active tab.

12.4 CHANGE GROUPS

A landmark is always assigned to a group and is active for all the vehicles assigned to that group and any groups below it in the group hierarchy. The Change Group feature allows you to move a landmark to a completely different group in the hierarchy or copy the landmark to another group in the hierarchy.

To Change a Landmark Group:

- 1. Select the landmark(s) that you want to move from one group to another.
- Use the Shift key to select adjacent landmarks and the Ctrl key to select non-adjacent landmarks.



Figure 102: Change Group Option

- 2. Click the Change Group button.
- The Change Group screen displays with the landmark's current group displayed in the Source Group field.
- The number of landmarks you have selected is included in parenthesis.
- 3. Click the **Choose** button.
- The Change Selection screen displays.



Figure 103: Change Selection Screen

4. Select the new group, and then click the OK button.

Change Group for	□×	
Source Group: Target Group:	WRXMA Enterprise Group	Choose
	 Move Copy 	
	Save Cancel	

Figure 104: Move or Copy Landmark

- 5. Select the **Move** option to move the landmark from one group to another group.
- 6. Select the **Copy** option to copy the landmark. The landmark will reside in both groups.
- 7. Click the Save button.

12.5 DEACTIVATE LANDMARKS

If you no longer need a landmark, you can deactivate it. Once a landmark is deactivated, any location-based alerts associated with the landmark will not trigger. At any point, you can reactivate a landmark. You cannot edit deactivated landmarks. If you want to modify a deactivated landmark, you must activate it.

To Deactivate a Landmark:

- 1. Select the landmark to deactivate from the Active list.
- You can deactivate multiple landmarks at once. Likewise, you can re-activate multiple landmarks at once.
- Use the Shift key to select adjacent landmarks and the Ctrl key to select non-adjacent landmarks.

) 💭	HERE <u>Terms of Use</u>		Blue Berr Hill	eevile	ehway 202 Chase Fiel Industria Complex	
) Filter	O Find Icon	▼ contains	v]	Go Rese	t	
) Filter	Find Icon		Geometry	Go Rese	t Radius	Group
	<u> </u>					Group DEMO2 Enterprise Group
con	Name 🔺		Geometry	Landmark Category	Radius	-
con F	Name		Geometry Circle Circle	Landmark Category Congregation Place	Radius 220	DEMO2 Enterprise Group
icon F-	Name A 11 Bob's Home	Address	Geometry Circle Circle Circle	Landmark Category Congregation Place Employee Home	Radius 220 150	DEMO2 Enterprise Group DEMO2 Enterprise Group
icon F F	Name A 11 Bob's Home Brookings home	Address 3750 THORNBERRY CT Co	Geometry Circle Circle Circle Circle	Landmark Category Congregation Place Employee Home Employee Home	Radius 220 150 500	DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group
icon F Con F Con Con Con Con Con Con Con Con Con Con	Name I1 Bob's Home Brookings home Calvin Pace home Catherine St. Beeville	Address 3750 THORNBERRY CT Cc 3334 WOOD CRK Corpus	Geometry Circle Circle Circle Circle Polygon	Landmark Category Congregation Place Employee Home Employee Home Employee Home	Radius 220 150 500	DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group
icon F- Con Con Con Con Con Con Con Con Con Con	Name I1 Bob's Home Brookings home Calvin Pace home Catherine St. Beeville	Address 3750 THORNBERRY CT Cc 3334 WOOD CRK Corpus 150 E CATHERINE ST BEEN	Geometry Circle Circle Circle Circle Polygon Circle	Landmark Category Congregation Place Employee Home Employee Home Employee Home Congregation Place	Radius 220 150 500	DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group
con F C C C C C C C C C C C C C C C C C C	Name I1 Bob's Home Brookings home Calvin Pace home Catherine St. Beeville Charles Brewmeister hom	Address 3750 THORNBERRY CT Cc 3334 WOOD CRK Corpus 150 E CATHERINE ST BEEN 1050 GREEN VIEW DR Cor	Geometry Circle Circle Circle Circle Polygon Circle Circle	Landmark Category Congregation Place Employee Home Employee Home Congregation Place Employee Home	Radius 220 150 500 500 500	DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group
con -1 -0 -0 -0 -0 -0 -0 -0 -0 -0 -0 -0 -0 -0	Name I1 Bob's Home Brookings home Calvin Pace home Catherine St. Beeville Charles Brewmeister hom Charlie Batch home	Address 3750 THORNBERRY CT Cc 3334 WOOD CRK Corpus 150 E CATHERINE ST BEEN 1050 GREEN VIEW DR Cor 2014 MELISA LN Corpus C	Geometry Circle Circle Circle Circle Circle Circle Circle Circle	Landmark Category Congregation Place Employee Home Employee Home Congregation Place Employee Home Employee Home Employee Home	Radius 220 150 500 500 500 500	DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group DEMO2 Enterprise Group

Figure 105: Deactivate Landmark Option

2. Click the Deactivate button.

Deactivate Landma	ark(s)					
	Are you sure you want to deactivate the selected landmark(s)?					
Yes No						

Figure 106: Confirm Landmark Deactivation

- 3. Click the **Yes** button to confirm landmark deactivation.
- FleetOutlook deactivates the landmark and moves it to the Inactive tab.

12.6 LANDMARK BULK UPLOADS

You can upload and save numerous landmarks at once using FleetOutlook's Bulk Upload feature. Bulk Upload uses a CSV formatted file, which allows you to quickly save numerous FleetOutlook landmarks with one action.

You must download the Landmarks template to your local computer in order to bulk upload your landmarks. The template is in CSV format (Comma Separated Value). The template contains three sample rows of data. Delete these rows prior to uploading the template to FleetOutlook. After you enter all of your landmarks, save the file. When prompted, keep the CSV format and name.

To Bulk Upload Landmarks:

- 1. Select the Landmarks tab, and then select the Active tab.
- 2. Click the **Upload** button.
- The Upload Landmarks screen displays.



Figure 107: Landmark Bulk Upload

- 3. Click the Landmarks template link at the bottom of the screen.
- The Save As dialog box displays.

- 4. Navigate to where you want to store the template, and then click the Save button.
- 5. Open the Landmarks template from the save location.
- 6. Delete the sample landmark information, and then add the information for your landmarks.
- You must use a complete address (City, State and Zip) or Latitude/Longitude coordinates.
- 7. Click the **Save** button to save the changes you made to the template.
- If you are using Microsoft Excel, you may receive a feature compatibility warning. Click the Yes button to keep the workbook in CSV format.

Microsoft	Excel
1	Landmarks.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format? • To keep this format, which leaves out any incompatible features, click Yes. • To preserve the features, click No. Then save a copy in the latest Excel format. • To see what might be lost, click Help.
	Yes No Help

Figure 108: Excel Warning

- 8. Navigate back to Active Landmarks tab in FleetOutlook Admin.
- 9. If the Upload Landmarks screen is not displayed, click the **Upload** button.
- 10. From the Upload Landmarks screen, click the **Browse** button to upload the saved bulk upload file.
- The Open dialog box displays.

🎱 Open	a per la la	X				
😋 🔍 🗢 🚺 🕨 Amy Platt 🕨 🛙	Downloads	✓ 4 Search Downloads				
Organize 🔻 New folder		8≡ ▼ 🗔 🔞				
▲ ★ Favorites	▲ Name	Date modified Type S				
📕 Downloads	🖾 Landmarks	12/17/2012 4:04 PM Microsoft Excel C				
📃 Recent Places						
🧮 Desktop	_					
 ✓ Constraints → Documents → Music → Pictures → SOP → Videos → Weekly Reports 						
4 🖳 Computer	- ·	······································				
File name:	Landmarks	✓ Documents (*.csv)				
		Open 🔽 Cancel				

Figure 109: Open Saved Landmark File

- 11. Select the saved bulk upload file, and then click the **Open** button.
- FleetOutlook automatically populates the File field with the template name.

Uploa	d Landmarks		Π×
File	Landmarks.csv	Browse Cancel Upload	
Inst	tructions and Templates	Upload Status	
	Template must be in CS POI Name, Landmark Cate	V format. gory, and either address or latitude/longitude are required fie	Ilds.
	Click the link beside tem landmarks.	plate to view and download template for uploading multip	le
	Update the template and	save to your computer as a CSV file format.	
	Select browse button, loc	ate the file and select the Upload button.	
	New Landmark will be dis	played under assigned groups in Landmarks list.	
Tem	plate(s): <u>Landmark(s</u>	D	

Figure 110: Upload Landmarks Screen

- 12. Click the **Upload** button.
- FleetOutlook uploads the landmarks and displays the Upload Status tab.

pload Landmarks		
ile Landmarks.csv	Browse Cancel Upload	
Instructions and Template	es Upload Status	
File: Landmarks.csv		
Total Rows in File: 1 Tot	tal Rows uploaded: 1	
Total Rows in File: 1 Tot Total Success Rows: 1 1		
Total Success Rows: 1 1		
Total Success Rows: 1 T Success Failed	Total Failed Rows: 0	
Total Success Rows: 1 T Success Failed POI Name	Total Failed Rows: 0 Status	
Total Success Rows: 1 T Success Failed POI Name	Total Failed Rows: 0 Status	
Total Success Rows: 1 T Success Failed POI Name	Total Failed Rows: 0 Status	
Total Success Rows: 1 T Success Failed POI Name	Total Failed Rows: 0 Status	

Figure 111: Upload Status

- Each row represents a landmark. FleetOutlook indicates if the landmark uploaded successfully or failed. For any landmarks that failed, you will have to fix the errors and re-upload them or create the landmark manually within FleetOutlook.
- 13. Click the Close button in the upper-right corner of the screen.
- FleetOutlook displays all successful landmarks on the Active tab.

12.6.1 LANDMARKS TEMPLATE COLUMNS

The following table outlines all of the available columns in the bulk upload template. While you have the option to define landmarks using latitude/longitude coordinates, we recommend that you use the complete address for the landmark.

Column	Description				
POI Name	Name of landmark.				
Street Name	Include both street number and street name. This field is required unless you supply latitude/longitude coordinates.				
City	This field is required unless you supply latitude/longitude coordinates.				
County	This field is required unless you supply latitude/longitude coordinates.				
State	Two-letter state abbreviation or full state name. This field is required unless you supply latitude/longitude coordinates.				
ZIP	Use the 5-digit ZIP code. This field is required unless you supply latitude/longitude coordinates.				
Latitude	Use the latitude coordinate for the landmark anchor point. This field is required unless you supply the complete address.				
Longitude	Use the longitude coordinate for the landmark anchor point. This field is required unless you supply the complete address.				
Landmark Category	User defined.				
Country Code	USA or Canada.				
Radius	If blank, defaults to 500 ft.				
Is Private	Do not use.				
Is Place Name	Indicates if the landmark type is place name – True/False. True indicates that it is a place name landmark.				
Is Polygon	Indicates if the landmark type is a polygon – True/False. True indicates that it is a polygon landmark.				
Is Work Site	Indicates if the landmark is a work site – True/False. True indicates that the landmark is a work site. Only landmarks marked as work sites displays on the TechDirect Gantt chart.				
Is GeoFence	Indicates if the landmark is a Geofence landmark – True/False. Geofence landmarks do not require a stop event to trigger landmark detection.				

13 ALERTS

Alerts are real-time, notifying fleet managers or other personnel when an activity is occurring in the field that requires immediate attention. FleetOutlook offers three types of Alerts: Location Based, Moving and General, and you can opt to receive an Alert Notification by the FleetOutlook UI Interface, Email, Text Message or only through the Reports platform.

Note: The number of alerts displayed depends on the group selected from the Enterprise Tree.

DEMO2 Base Group	Filter Find Alert Name	▼ contains	▼	Go	Reset			
V DEMO2 Enterprise Group								
Asset	Alert Name 🔺	Email Notify	UI Notify	Phone Notify	SMS Notify	Report Only	Version	Group
🔻 🚞 Landmark Services Div	Approaching Yard	No	Yes	No	No	No	5.6	DEMO2 Enterprise G
Business Services	Arriving at an Office	No	Yes	No	No	No	5.6	DEMO2 Enterprise 0
Residential Service:	Arriving Maintenance Depot	No	Yes	No	No	No	5.6	DEMO2 Enterprise 0
R30 Turn-Based Upda	Congregation Alert	No	Yes	No	No	No	5.6	DEMO2 Enterprise (
WO Services Division	Departing a Yard	No	Yes	No	No	No	5.6	DEMO2 Enterprise
DEMO2 Install	Entered Job Site A	No	Yes	No	No	No	5.6	DEMO2 Enterprise
	Idle Alerts	No	Yes	No	No	No	5.6	DEMO2 Enterprise
	Late Depart Driver Sched	No	Yes	No	No	No	5.6	Joe Smith - Manag
	Late departure in AM	No	Yes	No	No	No	5.6	DEMO2 Enterprise
	LEFT JOB SITE A	Yes	Yes	No	No	No	5.6	DEMO2 Enterprise
	Long Stop	No	Yes	No	No	No	5.6	DEMO2 Enterprise
	Speeding Event	No	Yes	No	No	No	5.6	DEMO2 Enterprise

Figure 112: Alerts Screen
13.1 ADD AN ALERT

Alerts are based on the group selected. If you want an alert to apply to your entire fleet, select the Enterprise Group, and then create the alert.

To Create an Alert:

- 1. Select the **Alerts** tab, and then select the **Inactive** tab.
- The alert will only trigger when any driver or vehicle in the selected group has an event that meets the predefined alert conditions.

Find	Active (16) Inactive (3)							
🗑 🗁 WRXMA Enterprise Group	Filter Find Alert Name	e 🔻 conta	ins 🔻		Go	Reset		
East Team								
Exec Team	Alert Name	Email Notify	UI Notify	Phone Notify	SMS Notify	Report Only	Version	-
Implementation	Congregation Alert	Yes	Yes	Yes	No	No	5.6	Base Camp
Installation	Late departure - Operations	Yes	Yes	Yes	Yes	No	5.6	Operations
Marketing	Stopped at landmark	No	No	No	No	Yes	5.6	Operations
Morrow								
New Test								
Operations								
Prod Mgmt								
🕨 🚞 Requirements Team								
WRXMA Install								
	Add Edit Activate	Retire	udit			1		

Figure 113: Add an Alert from Inactive Tab

- 2. Click the **Add** button.
- The Add Alert screen displays.

Alert			
Group: * WRXMA Enterprise Group	Choose Time (minutes) :	* 3	
Alert Name: * Unassigned Vehicle	Driver Category:	(None) 🔻	
Alert Type: * Long Idle	▼ Vehicle Category:	(None) 🔻	
Configure one or more alert notification methods Email FleetOutlook Text Msg Report Only			
] Enable FleetOutlook Alerts lert Priority: * High v			
Alert Text: * Long Idle > 3 Minutes	FleetOutlook	Filter: (None)	T

Figure 114: Add Alert Screen

- 3. If the correct name is not displayed in the **Group** field, click the **Choose** button, and then select the correct group from the **Change Selection** screen.
- If you selected the group from the Enterprise Tree, FleetOutlook automatically populates the Group field with the name of the group selected.
- 4. Enter an Alert Name.
- 5. Select an Alert Type from the drop-down list.
- Based on the Alert Type selected, additional options display. For example, if you select a location based alert, you must also select a Landmark Category option and Distance proximity.
- 6. Select the tab for the preferred Alert Notification Method (e.g., Email).
- You can select one or more alert notifications. For more information on alert notifications, refer to **Section 12.1.1: Alert Notification Methods**.
- 7. Select the Enable Alerts check box for each alert notification selected.
- Based on the Alert Notification Method selected, you must configure options associated with the method, such as entering an email text, subject and address for an email notification.
- 8. Click the Add & Activate button to add the Alert and immediately activate it.
- Click the Add button to add the Alert and activate it later.
- If you click Add & Activate, FleetOutlook saves the Alert and adds it to the Active Alert list.

13.1.1 ALERT NOTIFICATION METHODS

One of the benefits of FleetOutlook Alerts is the ability to receive immediate notification for your fleet conditions that require immediate attention. FleetOutlook sends alert notifications via three methods: email message, text message or FleetOutlook interface. By default, alert notifications are not enabled. You must select the enable check box for each alert notification method.

13.1.1.1 Email Message

You can send an alert notification to a single recipient or multiple recipients. To send to multiple recipients, separate each email address with a comma. Additionally, you can include BC or CC recipients. FleetOutlook requires you to include an email subject and message as well as one recipient in the To field.

Configure one or more alert notification methods	
Email FleetOutlook Text Msg Report Only	
Enable Email Alerts Email Body To Cc Bcc Email Subject: * Stopped at Landmark - Customer Email Text: * Stopped at Landmark - Customer	Email Filter: (None) 🔻

Figure 115: Email Message Alert Notification Options

13.1.1.2 FleetOutlook

FleetOutlook notifications display on several tabs within FleetOutlook: Vehicle Summary, Breadcrumb Detail and the Alerts tab. You must provide an alert priority and text. You can select from three set priority levels: low, medium and high. The Alert Text field is the text that displays in the FleetOutlook application. It is recommended to use the alert name in the Alert Text field.

When enabled, alert notifications display on three tabs within FleetOutlook:

- The Vehicle Summary tab displays a summary of all alerts triggered by vehicle for the past twenty-four hours.
- The Breadcrumb Detail displays alerts triggered by the corresponding event for the selected vehicle for the current day or selected time frame.
- The Alerts tab displays all alerts triggered for your fleet or select group for the past twentyfour hours.

Configure one or more alert notification methods	
Email FleetOutlook Text Msg Report Only	
✓ Enable FleetOutlook Alerts	
Alert Priority: * Medium •	
Alert Text: * Stopped at Landmark - Customer	FleetOutlook Filter: (None)

Figure 116: FleetOutlook Alert Notification Options

Text Message

You can send text alert notification to a single recipient or multiple recipients. To send to multiple recipients, separate each SMS address with a comma. FleetOutlook requires you to include the domain of the cellular carrier in the SMS Address field.

Note: We recommend that you limit text message notifications to the most important circumstances.

Verizon:	7032620500@vtext.com
AT&T:	7032620500@txt.att.net
T-Mobile:	7032620500@tmomail.net
Sprint:	7032620500@messaging.sprintpcs.com
Nextel:	7032620500@messaging.nextel.com
Alltel:	7032620500@message.alltel.com
Virgin Mobile:	7032620500@vmobl.com
CellularOne:	7032620500@mobile.celloneusa.com

	FleetOutlook	Text Msg	Report Only			
Enabl	e Text Msg Alerts					
Text	SMS Address	;				
	Add SMS Addre	55		SMS Filter:	(None)	
	Remove SMS Ad	dress				
		Enter a Valid SMS	Number		×	
		Enter one or mo	e SMS numbers (phonenumbe	r@provider)		
		separated by con	imas			
		Phone Number:	5551212121@vtext.com,5	551234567@txt.att.net		
					DK Cancel	

Figure 117: Text Message Alert Notification

13.1.2 ALERT NOTIFICATION FILTER

When you create an alert, you have the option to configure a combination of notification methods including by email, text message or from within the FleetOutlook application. All of these notifications include an option to filter the alert notification to trigger only on specific days and during set times. You cannot set a notification filter for the Reports Only notification option.

For example, as a fleet supervisor, you need to monitor drivers for excessive lunch breaks. You have set a Long Stop alert for any stop greater than 35 minutes; however, you do not want this alert to trigger all day because your drivers have jobs that do require stops longer than 35 minutes to complete. You can set each alert notification filter, Monday – Friday from 11 AM- 1 PM. You will only receive the alert notification if a vehicle stops for longer than 35 minutes during the specified days and time frames.

Note: Using alert notification filters may impact the data generated in the Alerts report. Alert notification filters may cause the results of the Alerts report to be filtered. The results of the Alerts report will be filtered when all enabled alert notification methods are configured with identical notification filters.

To Set a FleetOutlook Alert Notification Filter:

- 1. Log in to FleetOutlook Admin, and then select the Alerts tab.
- 2. Select the **Inactive** tab, and then click the **Add** button.

Add Alert	
Group: * WRXMA Base Group Choo Alert Name: * Long Lunch Alert Alert Type: * Long Stop Configure one or more alert notification methods	se Time (minutes) : ≱ 35 ↓ Driver Category: (None) ↓ Vehicle Category: (None) ↓
Email FleetOutlook Text Msg Report Only	
Enable FleetOutlook Alerts Alert Priority: * Medium Alert Text: * Long Lunch Alert	FleetOutlook Filter: Time of Day V Filter Method: * Day V Day(s): * Mon V Tues V Wed V Thurs V Fri Sat Sun From: * 11 AM V To: * 1 PM V Time Zone: EDT Start Interval: (None) V (None) V End Interval: (None) V (None) V
	Add & Activate Add

Figure 118: Alert Notification Filter

3. Configure the alert type and set the specific alert parameters as required for each alert.

- For step-by-step instructions on adding alerts, refer to Section 12.1 Add an Alert.
- You cannot edit an active alert. To add a filter for an existing alert, select the Active tab. Select the alert from the list, and then click the Edit button. Click Yes to confirm that you want to deactivate the alert.
- 4. Select the tab for the preferred Alert Notification Method (e.g., FleetOutlook).
- You can select one or more alert notification methods.
- 5. Based on the notification method selected, configure the notification settings (e.g., adding an email address, alert text, etc.)
- 6. Select the **Time of Day** option from the **Filter** drop-down list.
- The Filter field includes the name of the notification method. For example, if you add a filter to an email notification method, the filter field is name Email Filter.
- 7. Select the **Filter Method** from the drop-down list (e.g., Day).
- **Day** The Day option allows you to select specific days and time frame that you want to receive the alert notification. Selecting this option enables the Day(s), From and To fields.
- **Date Range** The Date Range options allows you to set a continuous filter for a specified interval. Selecting this option enables the Start Interval and End Interval fields.
- 8. Check the appropriate **Day(s)** check boxes (e.g., Mon-Fri).
- Selecting a Day check box enables the alert notification on for that day.
- 9. Select a starting and ending time range from the From and To fields (11 AM, 1 PM).
- The alert notification will only trigger during the time range specified from the From and To fields.
- 10. Repeat Steps #6-9 for each alert notification method enabled.
- 11. Click the Save & Activate button.

13.2 EDIT AN ALERT

You can only edit inactive alerts. If you need to modify the configurations for an alert, you must inactivate the alert first.

To Edit an Alert:

- 1. Select the group to which the alert belongs from the Enterprise Tree.
- 2. Select the **Alerts** tab.

DEMO2 Base Group	Filter Find Alert Name	▼ contains		Go Re	set			
🔻 🗁 DEMO2 Enterprise Group	Filter Find Alert Name	contains	v	Go Re	set			
Asset	Alert Name 🔺	Email Notify	UI Notify	Phone Notify	SMS Notify	Report Only	Version	Group
🔻 🚞 Landmark Services Div	Approaching Yard	No	Yes	No	No	No	5.6	DEMO2 Enterprise (
Business Services	Arriving at an Office	No	Yes	No	No	No	5.6	DEMO2 Enterprise
Residential Service:	Arriving Maintenance Depot	No	Yes	No	No	No	5.6	DEMO2 Enterprise
R30 Turn-Based Upda	Congregation Alert	No	Yes	No	No	No	5.6	DEMO2 Enterprise
WO Services Division	Departing a Yard	No	Yes	No	No	No	5.6	DEMO2 Enterprise
DEMO2 Install	Entered Job Site A	No	Yes	No	No	No	5.6	DEMO2 Enterprise
	Idle Alerts	No	Yes	No	No	No	5.6	DEMO2 Enterprise
	Late Depart Driver Sched	No	Yes	No	No	No	5.6	Joe Smith - Manag
	Late departure in AM	No	Yes	No	No	No	5.6	DEMO2 Enterprise
	LEFT JOB SITE A	Yes	Edit Alert		No	No	5.6	DEMO2 Enterprise
	Long Stop	No			No	No	5.6	DEMO2 Enterprise
	Speeding Event	No	Alert will be dead	tivated before edit.	No	No	5.6	DEMO2 Enterprise
			Deactivate Alert	and continue with edit?				
			Yes	No				
					9			

Figure 119: Deactivate an Alert to Edit

- 3. Select the alert, and the click the **Edit** button.
- 4. Click the **Yes** button to deactivate and continue with edit.
- The Edit Alert screen displays.

Edit Alert C	⊐×
Group: * Bob Jones - Manager Choose Late (minutes) : * 20 • Alert Name: * Late Depart Driver Sched Alert Type: * Late Departure-Driver Schedule • Configure one or more alert notification methods Email FleetOutlook Text Msg Report Only	
✓ Enail Body To Cc Bcc Email Subject: * Late Departure Email Filter: (None) Email Text: * Vehicle/Driver is 20 mins late	
Last modified: Matt Miller 06-Apr-2012 12:00:10 PM EDT Save & Activate Save Created: Matt Miller 06-Apr-2012 11:59:46 AM EDT Save Save	

Figure 120: Edit Alert Screen

- 5. Modify the alert settings as needed, and then click the **Save and Activate** button.
- If you click the Save button, FleetOutlook saves the changes made to the alert, but does not activate the alert. The alert will not trigger until you activate it.

13.3 DEACTIVATING AN ALERT

You can activate and deactivate alerts as needed. Inactive alerts do not trigger or send automatic alert notifications, but are available for future use. If you want to remove an alert from FleetOutlook permanently, you must retire the alert. You can only retire inactive alerts.

To Deactivate an Alert:

- 1. Select the group to which the alert belongs from the Enterprise Tree.
- 2. Select the Alerts tab, and then click the Active tab.
- 3. Select the alert, and then click the **Deactivate** button.

r 🗁 WRXMA Enterprise Group		Filter Find Alert Name	▼ contains	•		GoReset			
Exec Team		Alert Name 🔺	Email Notify	UI Notify	Phone Notify	SMS Notify	Report Only	Version	Group
Implementation		Arrived at School	Yes	Yes	No	Yes	No	5.6	Training
Installation		Carmell Speeding	No	No	No	Yes	No	5.6	Operations
Marketing		Late Arrival Home	No	No	No	Yes	No	5.6	Operations
Morrow		Long idle	No	Yes	Yes	Yes	No	5.6	Operations
New Test		Long idle	No	Yes	No	No	No	5.6	Training
Operations		Long Stop	No	Yes	No	No	No	5.6	Training
 Prod Mgmt ▶ Requirements Team WRXMA Install 	=	View Edit Deactivate	Audit		re you want to he selected Alert(s)??				

Figure 121: Deactivate an Alert

- 4. Click the **Yes** button to confirm deactivation.
- FleetOutlook deactivates the alert and moves the alert to the Inactive tab.
- Inactive alerts do not trigger or send automatic alert notifications. You can reactivate an inactive alert.

14 ROLES

Roles are used in FleetOutlook to limit groups of users to specific functionality. Each role has a set of permissions, and each user (login) has an assigned a role that defines FleetOutlook access.

We strongly recommend you limit administration access to as few users as possible, as FleetOutlook data integrity and performance can be significantly compromised if unwanted changes are made to vehicle, device or driver assignments.

Find	Active (4) Inactive (5)		
WRXMA Enterprise Group	Filter Find Role Type Contains	Go Reset	
East Team			_
Exec Team	Role Type	Description	
Implementation	EADMN	Enterprise Administrator	
Installation	EUser	End User - No Reports, View Manage	
Marketing	GADMN	Group Administrator	
Morrow	User	User	
New Test			
Verations			
Roadside Assistance			
Training			
Prod Mgmt			
🔻 🚞 Requirements Team			
Base Camp			
Installation			
Technical Developmen			
WRXMA Install			
	Add Edit Deactivate		_

Figure 122: Roles Screen

14.1 ROLES AND PERMISSIONS OVERVIEW

If your enterprise was created after July 1, 2012, you will have the top set of roles in the table below available to you. If your enterprise was created before July 1, 2012, you will have the bottom set of roles available.

Role	Role Definition					
Administrator (ADMIN)	By Default can perform all functions for enterprise, except Enterprise Management, Report Set-up, Device Management.					
Executive/Manager (MANGR)	Management access that is view only, but has access to most tabs.					
Direct Supervisor (SUPVR)	Has permissions tailored to the Supervision of drivers and technicians.					
Dispatcher (DSPCH)	Has permissions tailored to the needs of a dispatcher.					
Fleet Manager (FLEET)	Has permissions tailored to the needs of a Maintenance Manager or Fleet Manager responsible for equipment.					
Maintenance Personnel (MAINT)	Permissions are for logging in and checking off Vehicle maintenance actions in VMM.					
View Only (VIEW)	Viewing of both FOA and FO but no editing capability.					
Construction Role	Construction Role Definition					
Construction Admin (CADMN)	By Default can perform all functions for enterprise, except Enterprise Management and Report Set-up					
Construction Equipment Supervisor (CSPVR)	Has permissions tailored to the Supervision of equipment.					
Construction View Only (CVIEW)	Viewing of both FOA and FO but no editing capability					

14.1.1 ADD OR EDIT A ROLE

Role Permissions are set by going to the Roles tab in FleetOutlook Admin and should only be accessible by a system administrator. FleetOutlook Admin does not allow an EADMN to provide role administration permissions to other roles.

To Add a Role:

- 1. Select the Roles tab, and then click the Add button.
- The Create Role screen displays.

Find	Active (10) Inactive (5)		
DEMO2 Base Group DEMO2 Enterprise Group	Filter ○ Find Role Type ▼ Contains ▼	Go Reset	
Asset	Role Type	Description	
🔻 🗁 Landmark Services Div	DSPCH	Dispatcher	
Business Services	Demo	Demonstration Only	
Residential Service: R30 Turn-Based Upda ▶ WO Services Division DEMO2 Install	EADMN Landm Maint MnMgr SUPER Description Type Code Drive SUPVR TEST View		
	Add Edit Deactivate		

Figure 123: Create Role

- 2. Enter a **Type Code**.
- We recommend naming the role an easily recognizable name. The Type Code field is limited to 5 characters.
- 3. Enter a brief **Description**.
- 4. Click the **Add** button.
- To edit an existing role's settings, select the role from the Active list, and then click the **Edit** button. The Edit Role screen displays.

Edit Role							Π×
	Drive Only change a ports Mana Assigned Vehicle Assigni	ge Vehick	e Maint	Tecl	h Direct Add Drive Add Drive	Tracking Available r r Contact Info	
View Vehicle			< Add Remove > << Add All emove Al		Edit Drive	r Contact Info le	
							Save

Figure 124: Edit Roles Screen

- 5. Select the permission(s) from the Unassigned list, and then click the **< Add** button.
- You can add multiple permissions at once. Use the Shift key to select adjacent permissions and the Ctrl key to select non-adjacent permissions. Remove permissions in the opposite order.
- 6. Click the **Save** button.
- 7. FleetOutlook creates the role and displays it on the Active list. Next, you must assign the role to a user.

WRXMA Enterprise Group Filter Find Role Type Contains Go Reset				
East Team	er Find Role Type V contains V	Go Reset		
Exec Team Role T	Туре	Description		
Implementation Drive		Only change assignment		
Installation EADM	N	Enterprise Administrator		
Marketing EUser	r	End User - No Reports, View Manage		
Morrow GADM	IN	Group Administrator		
New Test User		User		
🛛 🗁 Operations				
Roadside Assistance				
Training				
Prod Mgmt				
🛛 🗁 Requirements Team				
Base Camp				
Installation				
Technical Developmen				
WRXMA Install				
Add	Edit Deactivate			

Figure 125: New Role Listed

14.1.2 DEACTIVATE A ROLE

You cannot deactivate a role if the role is assigned to a user or if the role has permissions assigned to. Once deactivated, you cannot activate the role in the future. Additionally, you cannot reuse the 5-digit Code Type assigned to the role.

Note: Before deactivating, verify that you have removed the role from all users, and you have removed the permissions from the role.

To Deactivate a Role:

- 1. Select the **Roles** tab, and then select the **Active** tab.
- 2. Select the role to deactivate, and then click the **Deactivate** button.

Find	Find Active (5) Inactive (5)			
🔻 🚞 WRXMA Enterprise Group		Filter Find Role Type Contains	•	Go Reset
🗋 East Team				
Exec Team		Role Type		Description
Implementation		Drive		Only change assignment
Installation		EADMN		Enterprise Administrator
Marketing		EUser		End User - No Reports, View Manage
Morrow		GADMN		Group Administrator
New Test		User		User
Verations			Deactivate Role(s)	
Roadside Assistance				
Training			Are you sure you want to	
Prod Mgmt			deactivate the selected role(s)?	
🔻 🚞 Requirements Team			Yes No	
Base Camp				
Installation		*		
Technical Developmen				
WRXMA Install				
		Add Edit Deactivate		

Figure 126: Deactivate a Role

3. Click the Yes button to confirm deactivation.

15 SUPPORT TAB

The Support Tab has several customizable user settings. The Support tab contains two subtabs: Users Options and About FleetOutlook.

15.1 USER OPTIONS TAB

The User Options sub-tab allows you to change your password. Your password is the same for both FleetOutlook and FleetOutlook Admin. If you change your password within FleetOutlook Admin, you must use the new password when logging in FleetOutlook.

User Options About FleetOutlook Admin Contact Us	
Password Management: Change Password	

Figure 127: User Options Tab

15.2 ABOUT FLEETOUTLOOK ADMIN

The About FleetOutlook tab displays the latest version of FleetOutlook Admin.

User Options About FleetOutlook Admin Contact Us	
CalAmp, Inc. 2015 FleetOutlook Admin (version 8.1.0.5.26)	
Built: 2015-06-05 02:39:26	
(c)2015 CalAmp, Inc. All rights reserved.	
Flash Player Version: WIN 18,0,0,209	
Flex SDK Version: 3.2.0.3958 AVM Version: 2.1 sec cyclone	
FleetOutlook Web Service Version: 8.1.0.5.27	
The FleetOutlook Administrator Portal allows you to perform a wide range of functions on your own, including set-up and ongoing administration, without requiring assistance from CalAmp. Get up and running fast using our bulk upload capabilities for users, drivers, vehicles and landmarks.	
calamp.com	

Figure 128: About FleetOutlook Tab