CalAmp®

FleetOutlook™

Admin User Guide

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TABLE OF CONTENTS

LIST OF FIGURES

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 www.wrx-us.net.

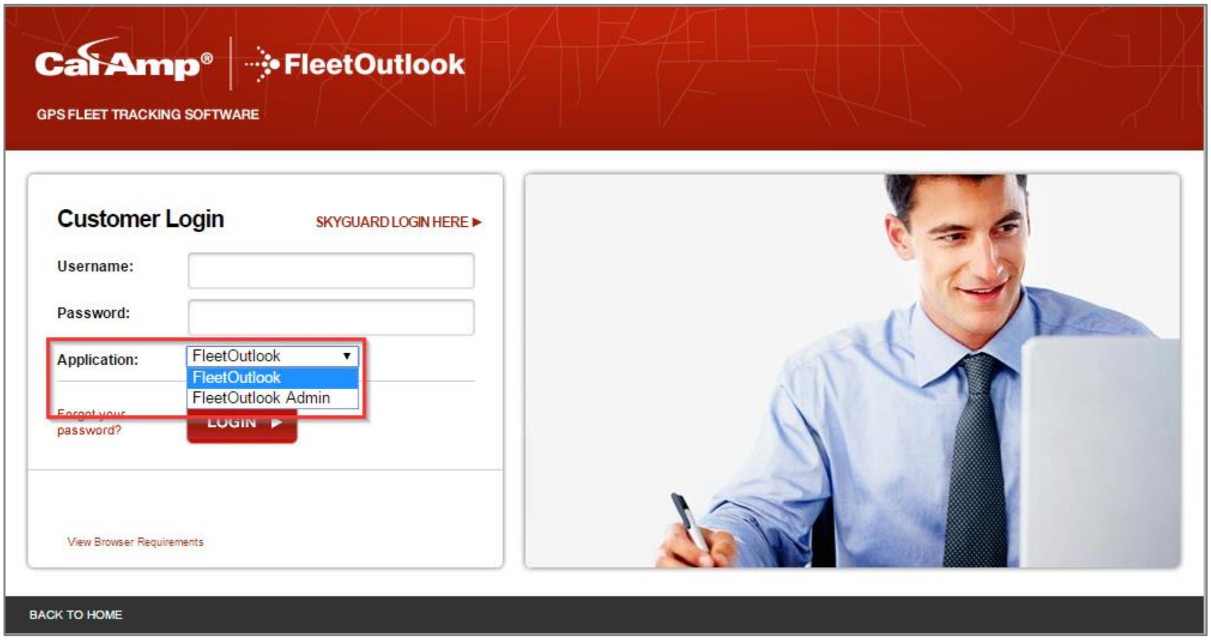


Figure 1: FleetOutlook Login Screen

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		X
Create and Manage Vehicles	*	X
Create and Manage Assets		X
Create and Manage Drivers	*	X
Create and Manage Users		X
Create and Manage Alerts		X
Create and Manage Landmarks		X
Create and Run Reports	X	
Create and Monitor Dashlets	X	
Monitor Vehicles and Drivers	X	
Monitor and Manage Schedules	X	
Work with Garmin Messages	X	
Manage and Track Work Orders	X	

* 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.

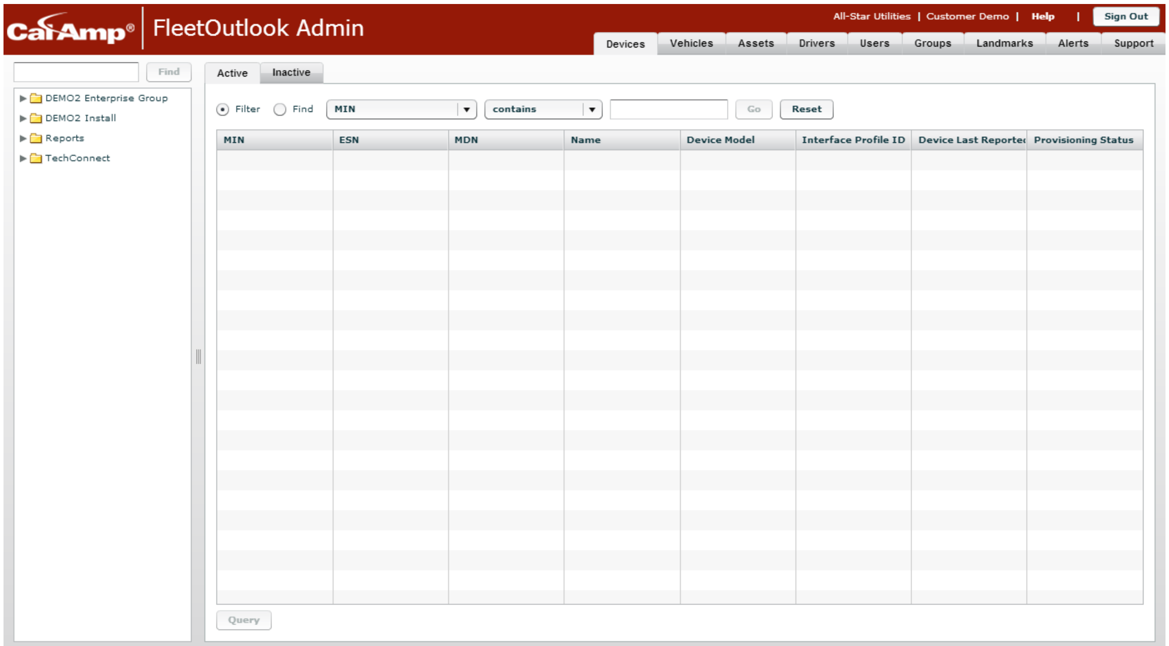


Figure 2: FleetOutlook Admin Screen

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.

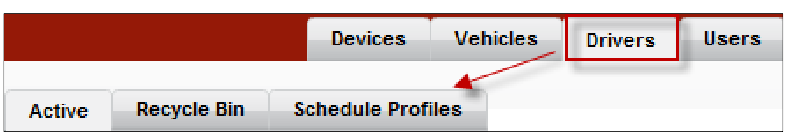


Figure 4: FleetOutlook Sub-tabs Example

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.

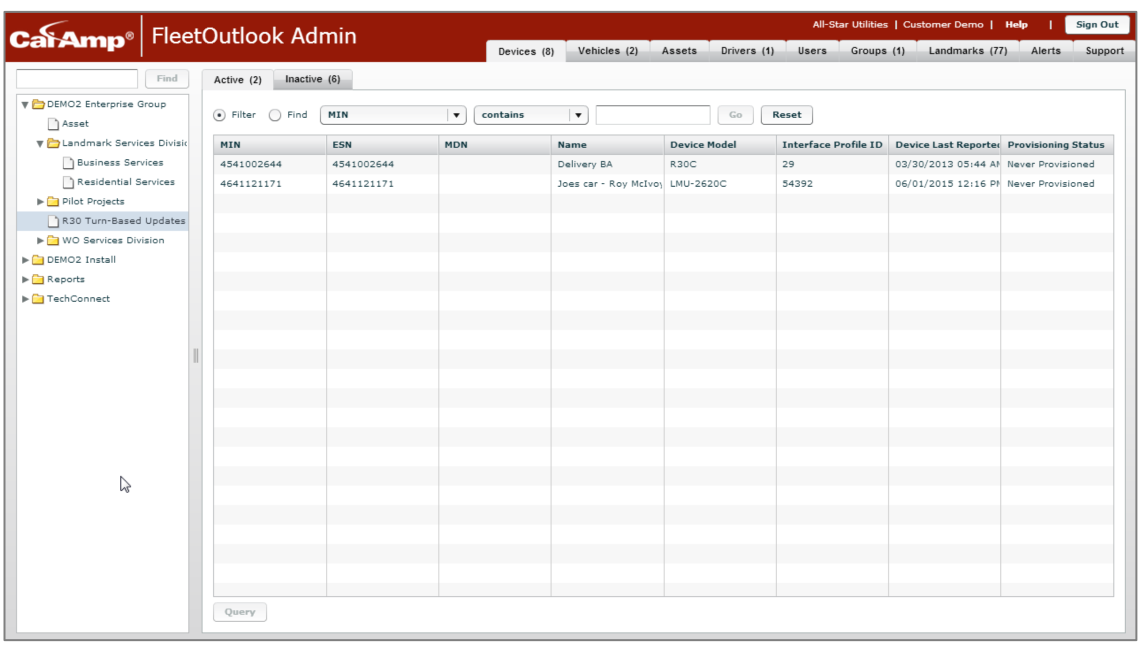


Figure 5: Enterprise Group Tree

4.3 HELP BUTTON

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

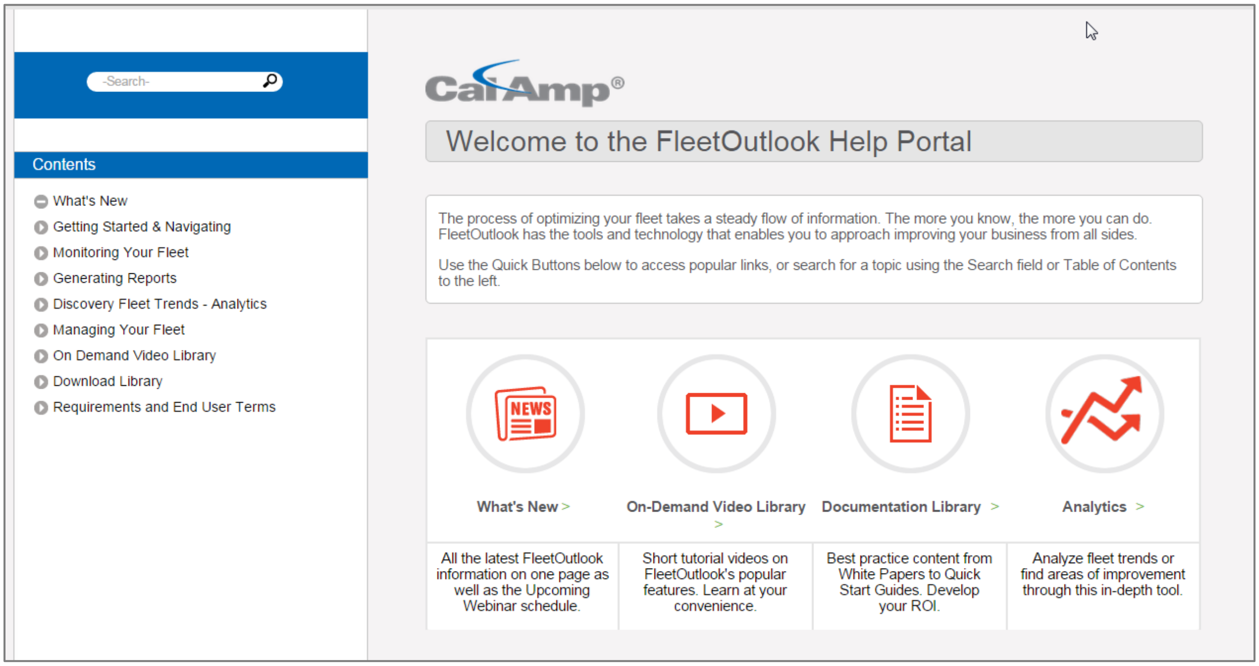


Figure 6: FleetOutlook Help Portal

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.

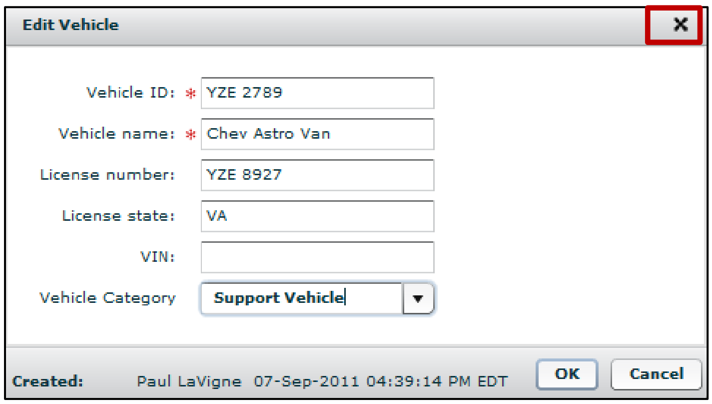


Figure 7: Close without Saving

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.

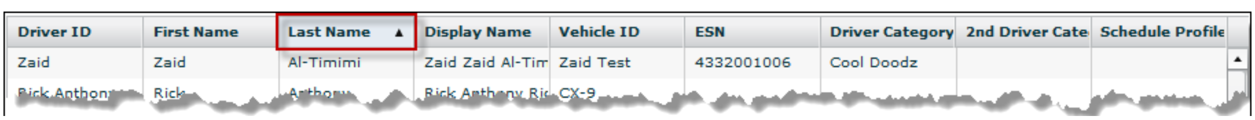


Figure 8: Sort Capability

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.

Note: 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.

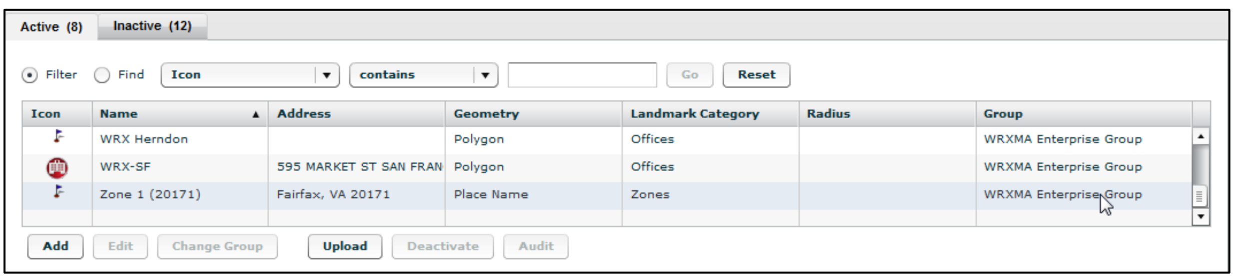


Figure 10: Row Highlights

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.

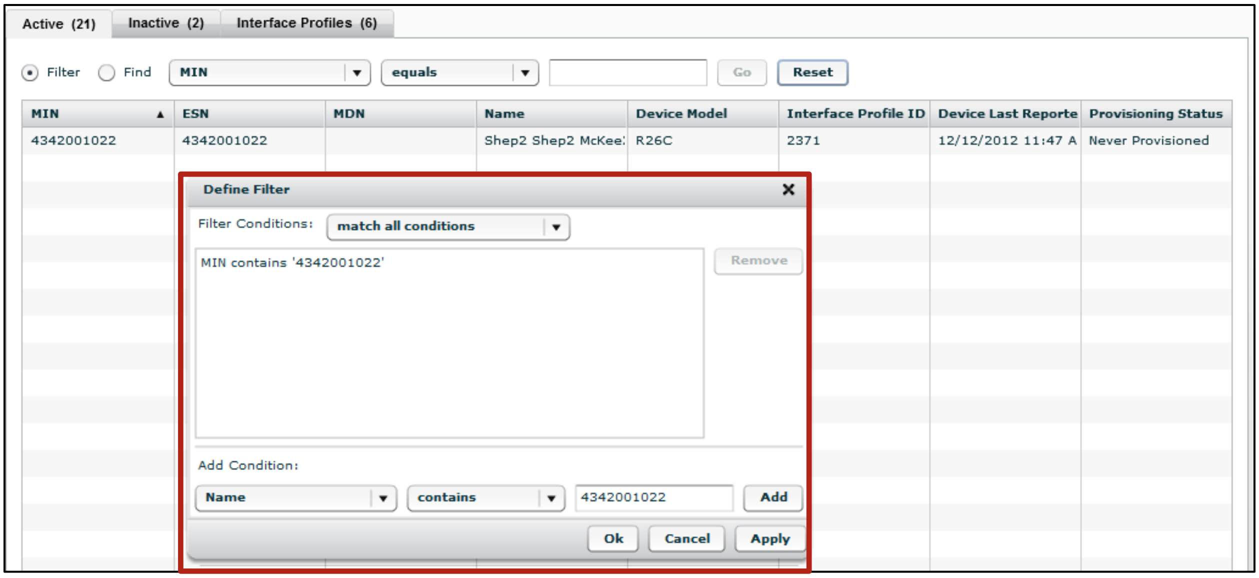


Figure 11: Filter a List Functionality

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.

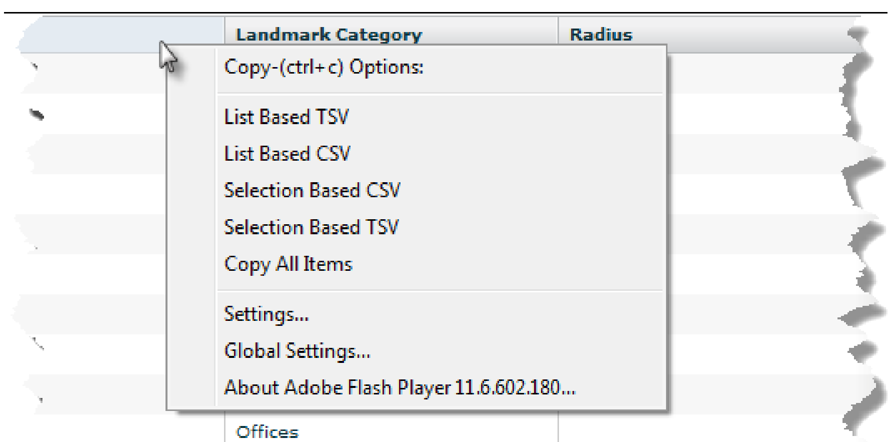


Figure 12: List Copy Menu

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-to-vehicle 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.

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

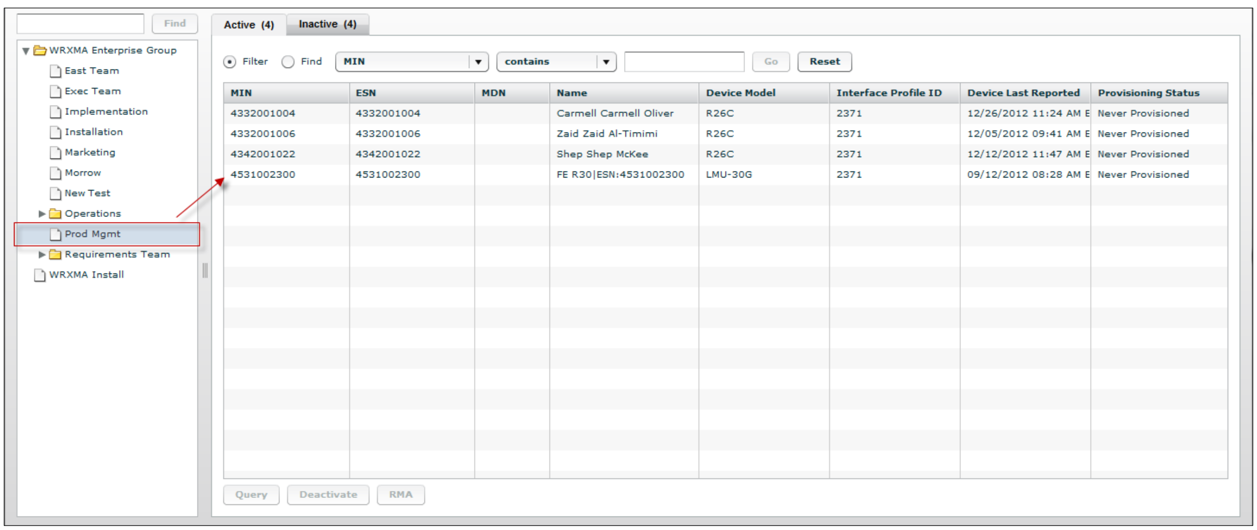


Figure 13: Active Devices Screen

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.

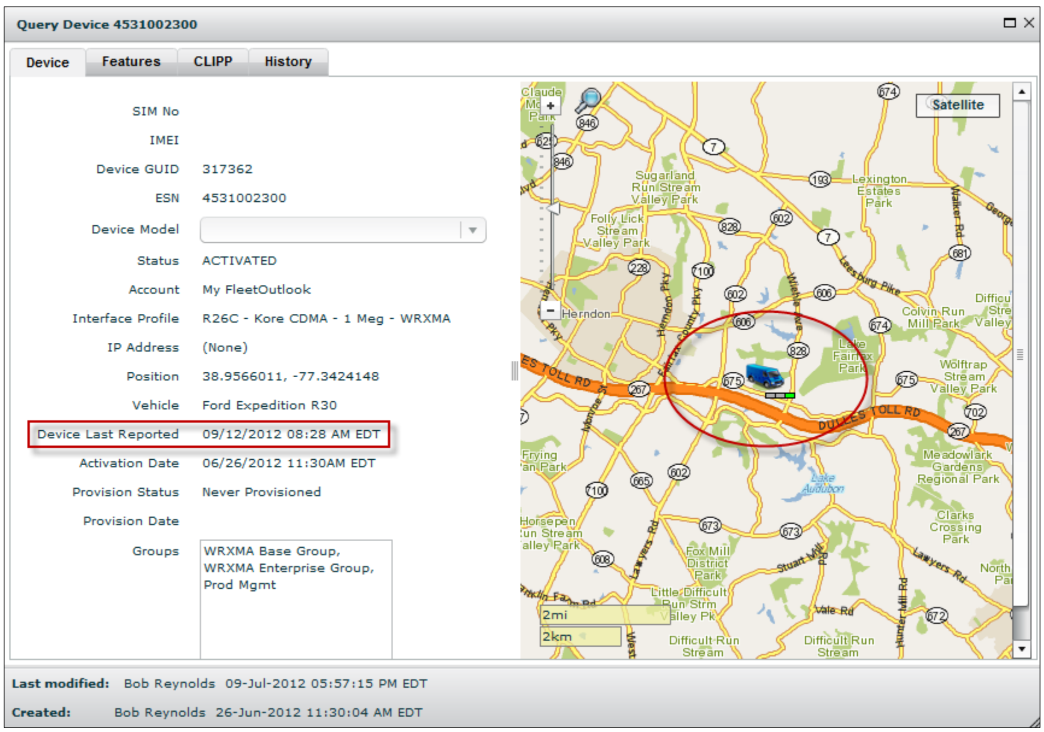


Figure 14: Device Query Screen

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.

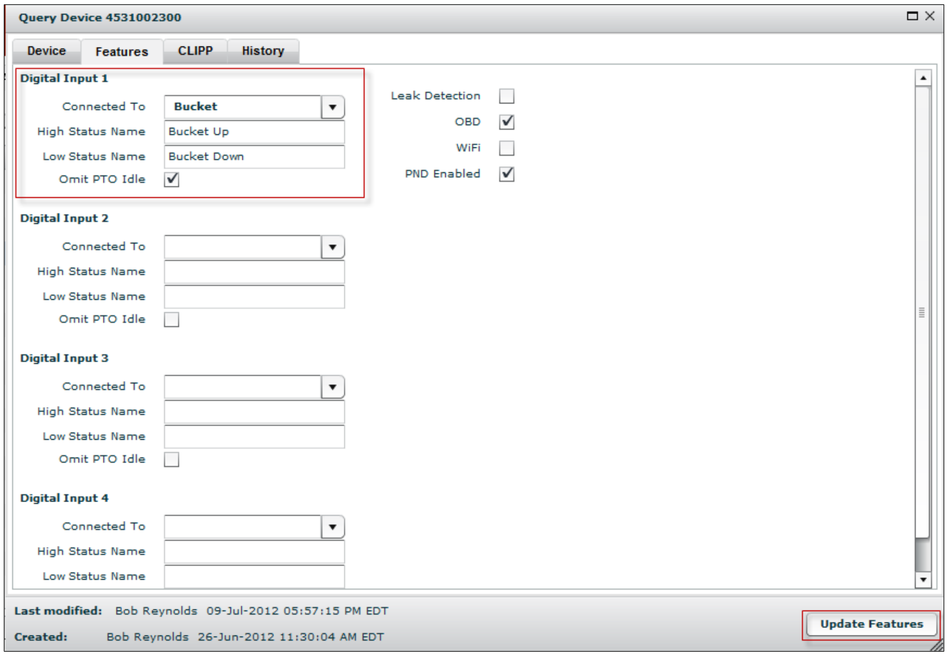


Figure 15: Device Features Screen

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.

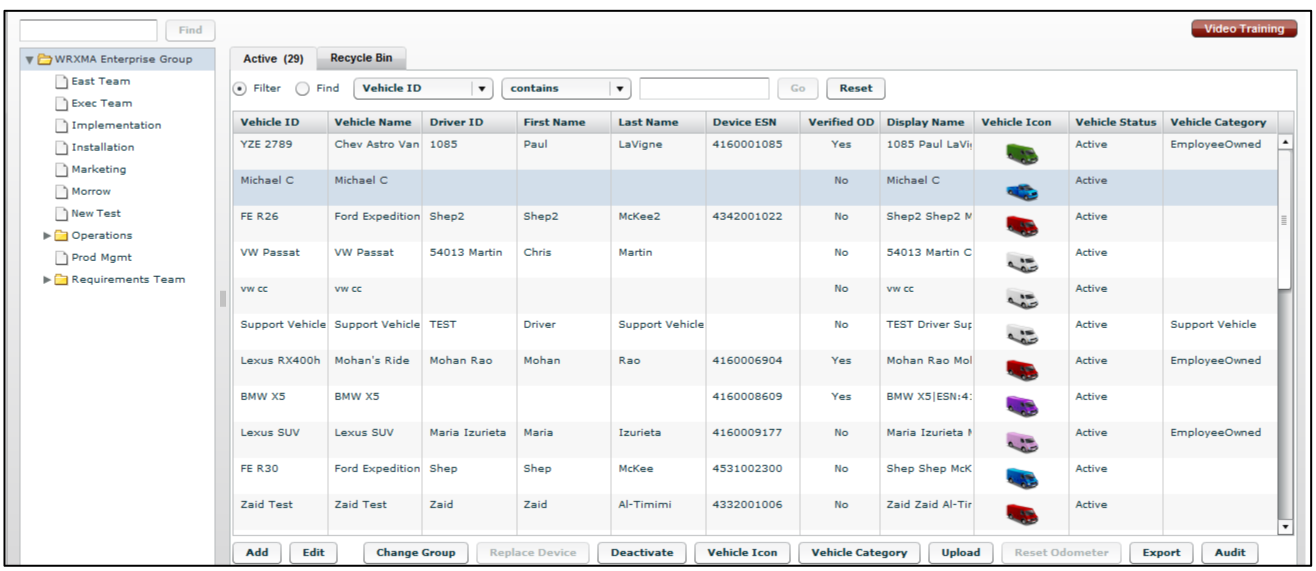


Figure 16: Vehicles List

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.

Figure 17: Vehicle - Active Tab Options

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.

2. Select the **Vehicles** tab.

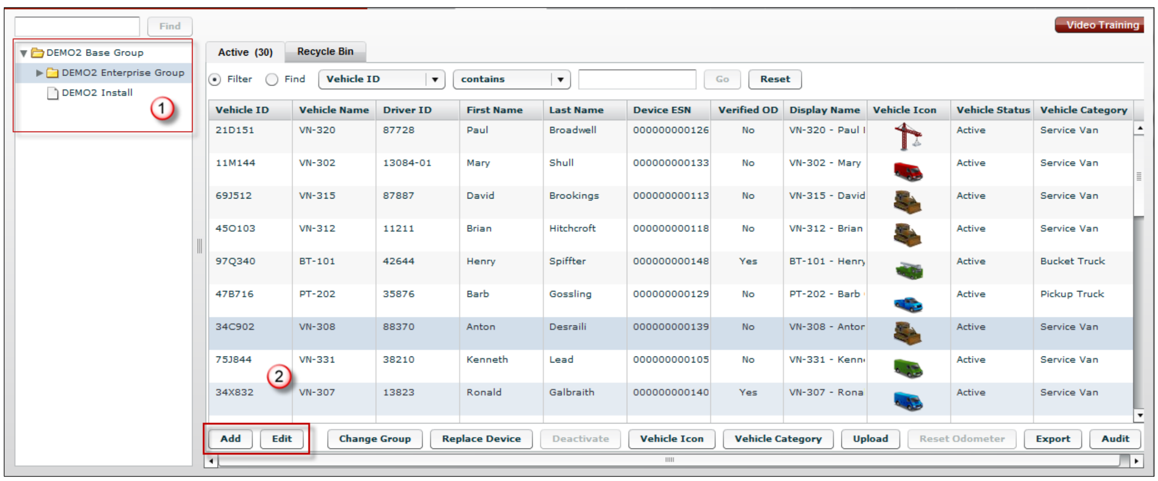


Figure 19: Active Vehicles - Add New Vehicle/Edit Existing Vehicle

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.

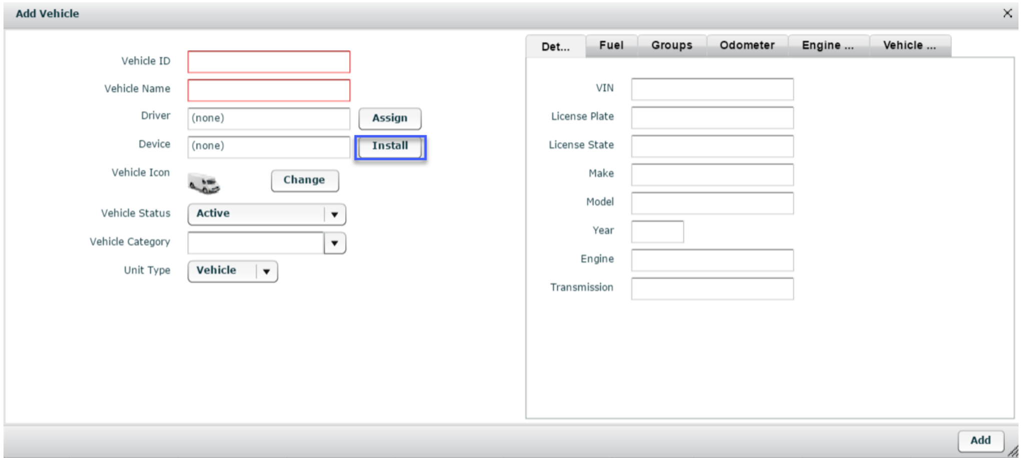


Figure 20: Add Vehicle Screen

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.

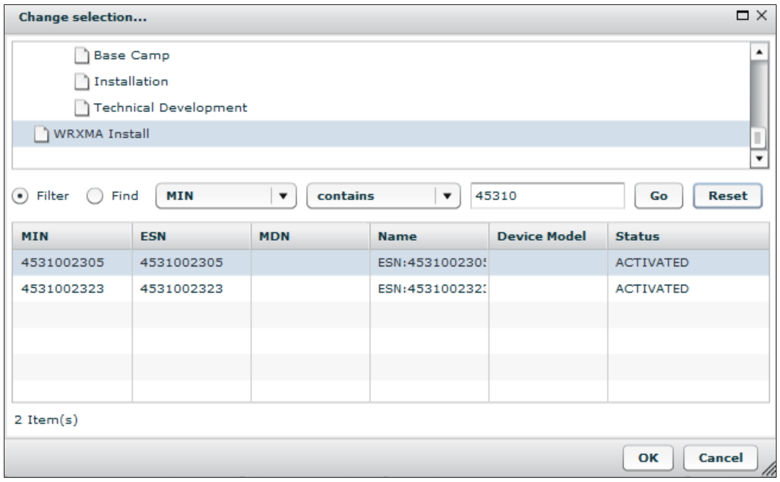


Figure 21: Assign Device Screen

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.

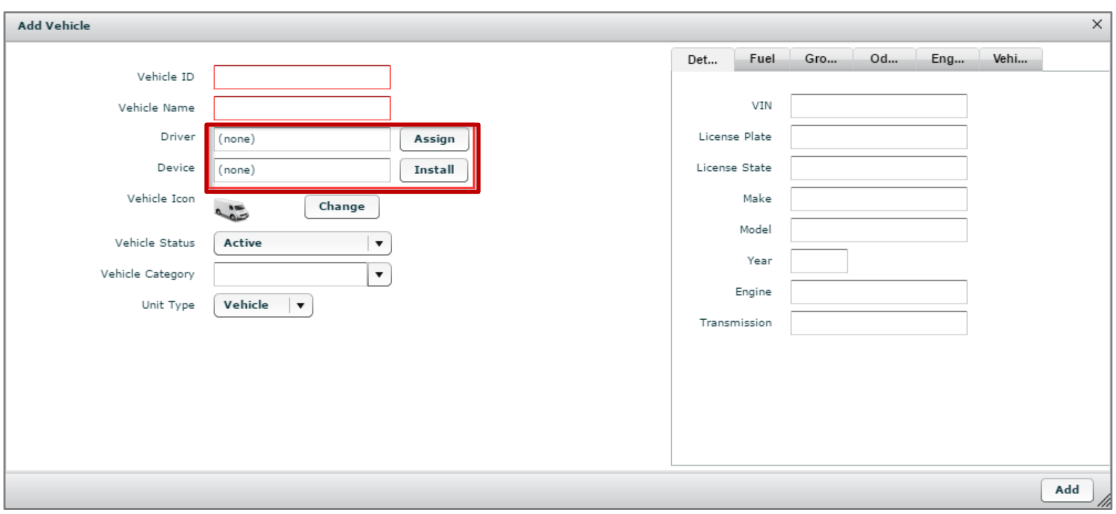


Figure 22: Add Vehicle Screen - Device Installed

10. Click the **Vehicle Icon**, and then select a vehicle type and color.

- Refer to Vehicle Icons and Colors 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.

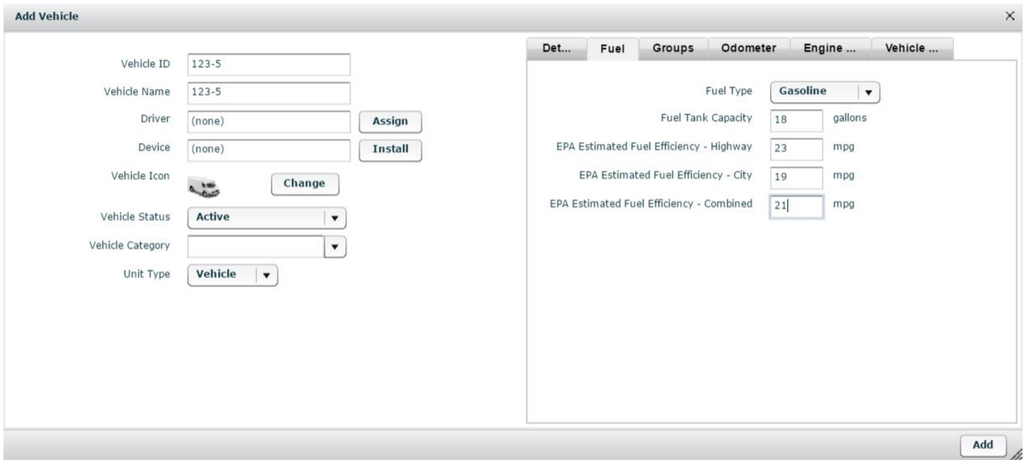


Figure 23: Vehicle Fuel Settings

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.

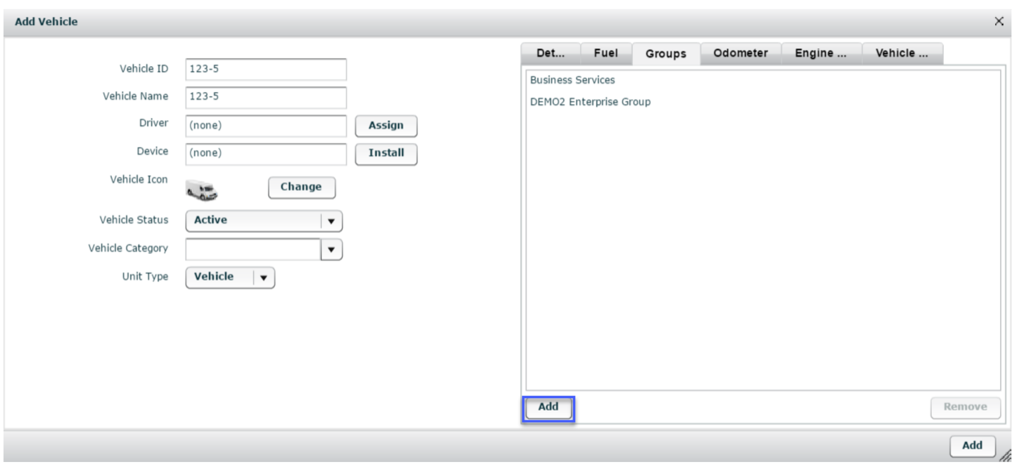


Figure 24: Add Groups Button

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.

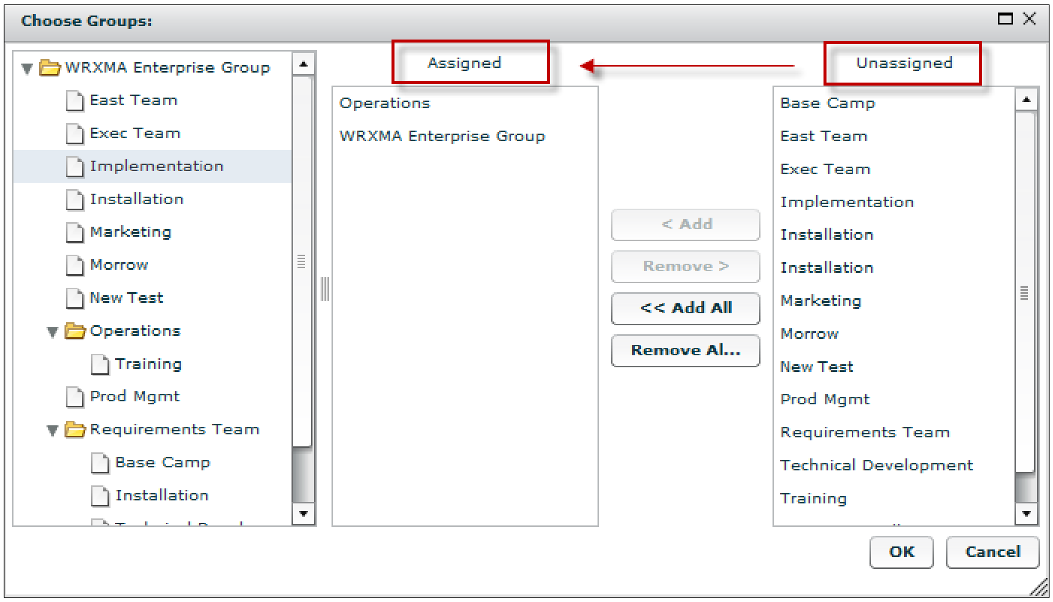


Figure 25: Choose Group Screen

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.

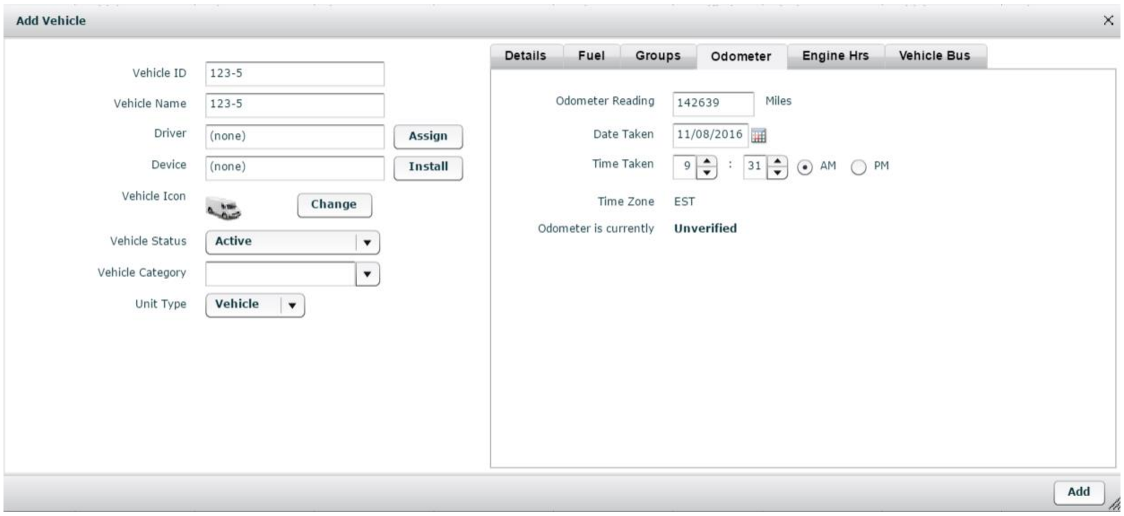


Figure 26: Vehicle Odometer Settings

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

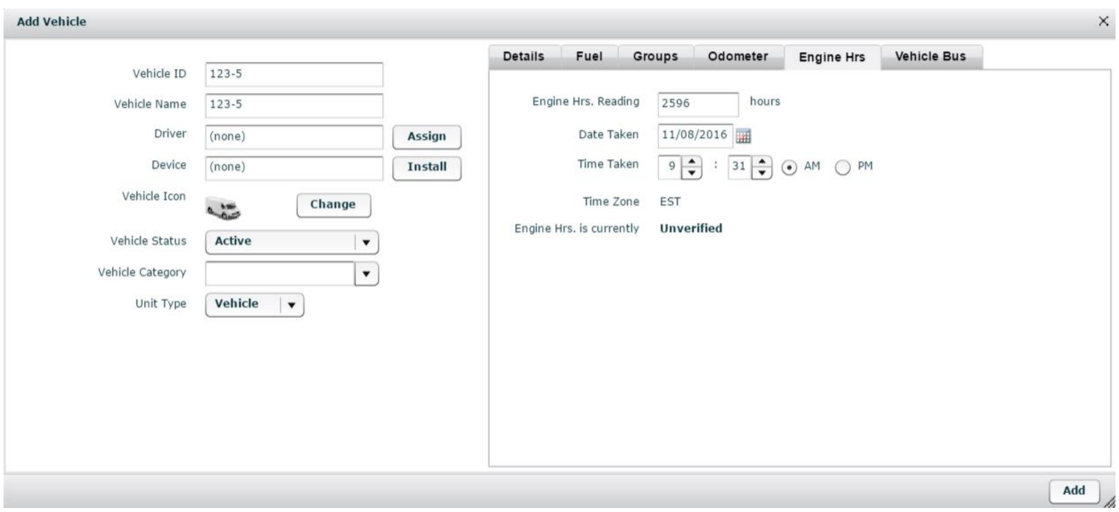


Figure 27: Engine Hours Setting

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.

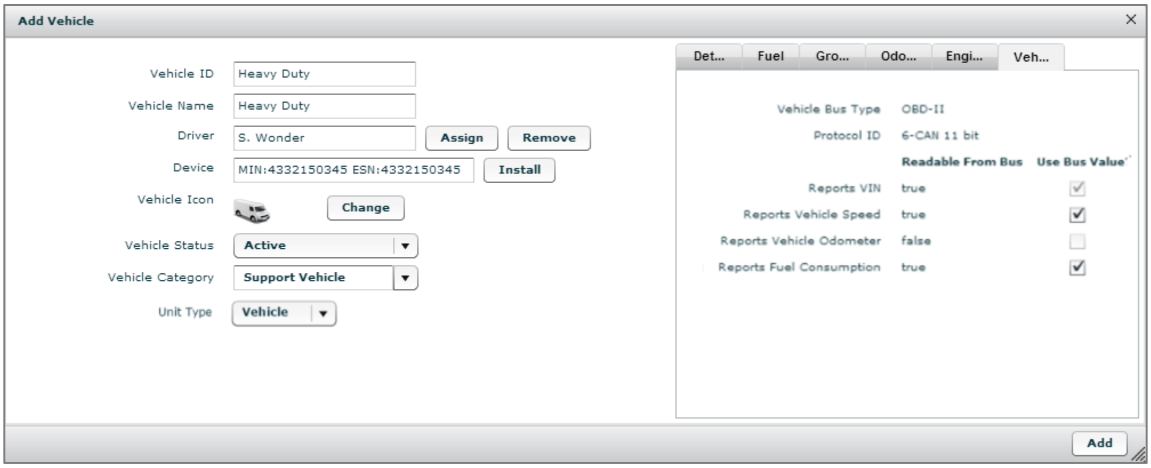


Figure 28: Vehicle Bus

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.

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

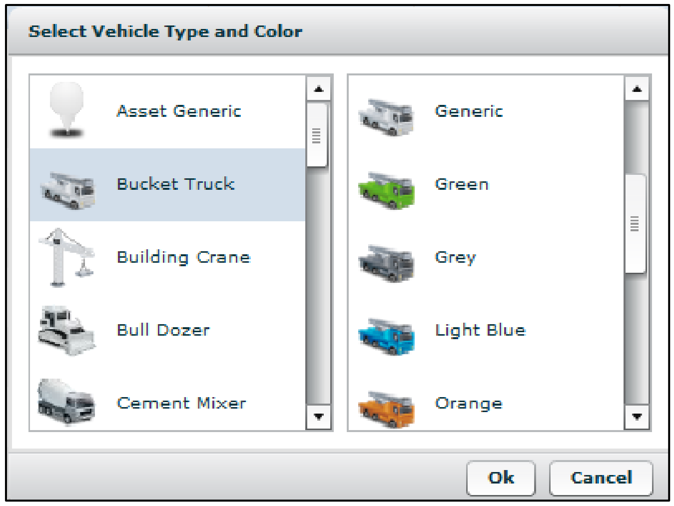


Figure 29: Selection Vehicle Type and Color Screen

Icon Name	Icon	Icon Name	Icon
Generic Asset		Sedan	
Bucket Truck		Service Van	
Building Crane		Step Van	
Bulldozer		Tanker Truck	
Cement Truck		Tow Truck	
Dump Truck		Tractor Trailer	
Excavator		Trailer	
Flatbed Truck		Trash Truck	
Pickup Truck		Box Truck	

Figure 30: Available Vehicle Icons and Colors

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.

<u>To Assign a Driver to a Vehicle:</u>

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.

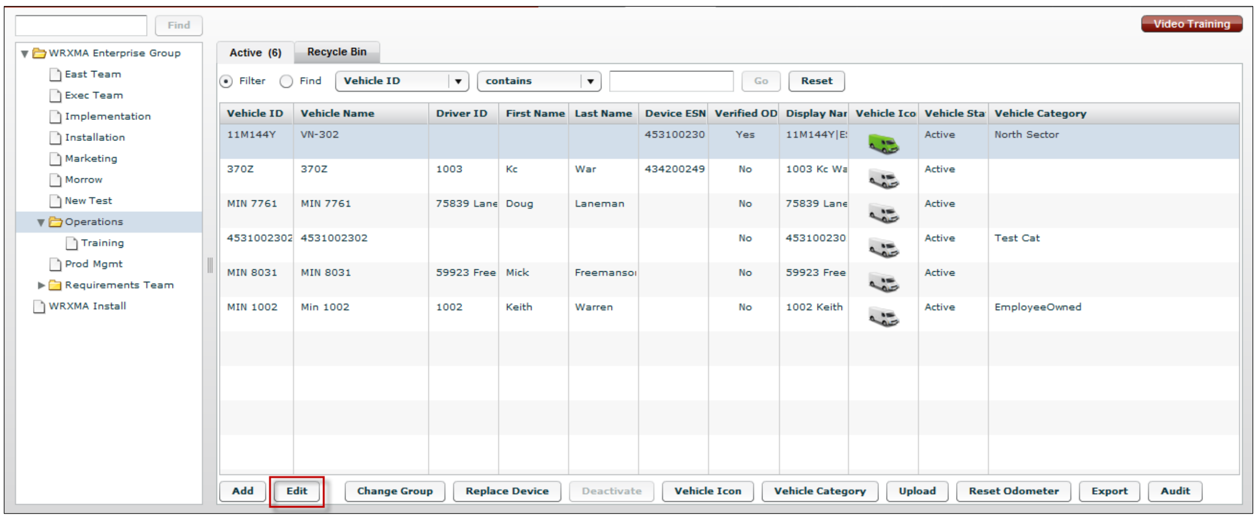


Figure 31: Select Vehicle to Edit

- The Edit Vehicle screen displays.

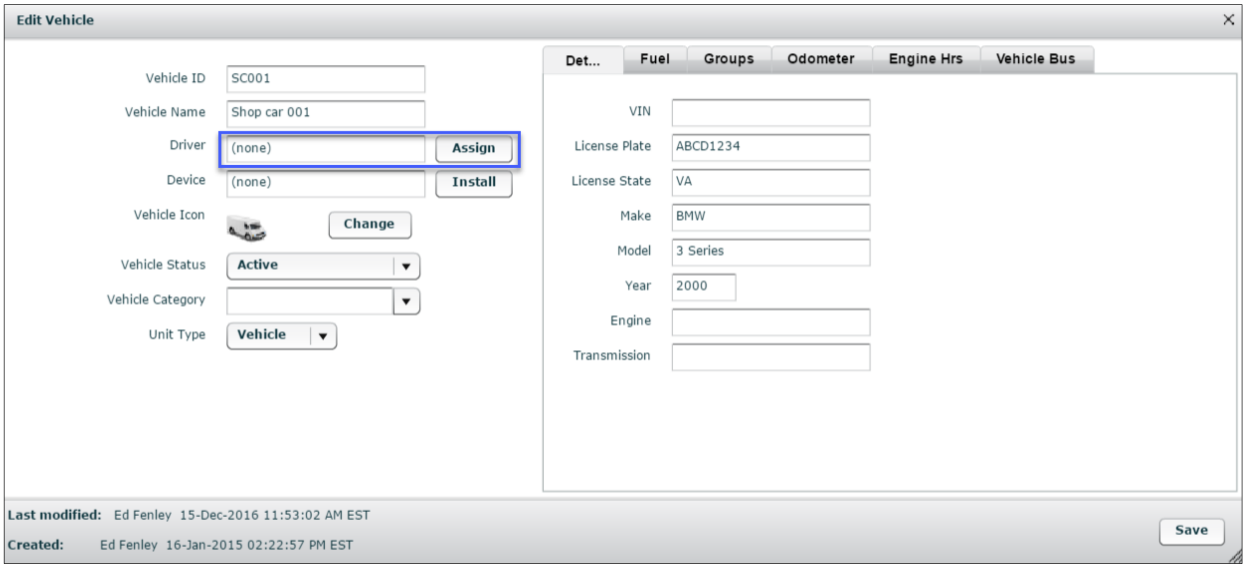


Figure 32: Edit Vehicle Settings Screen

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

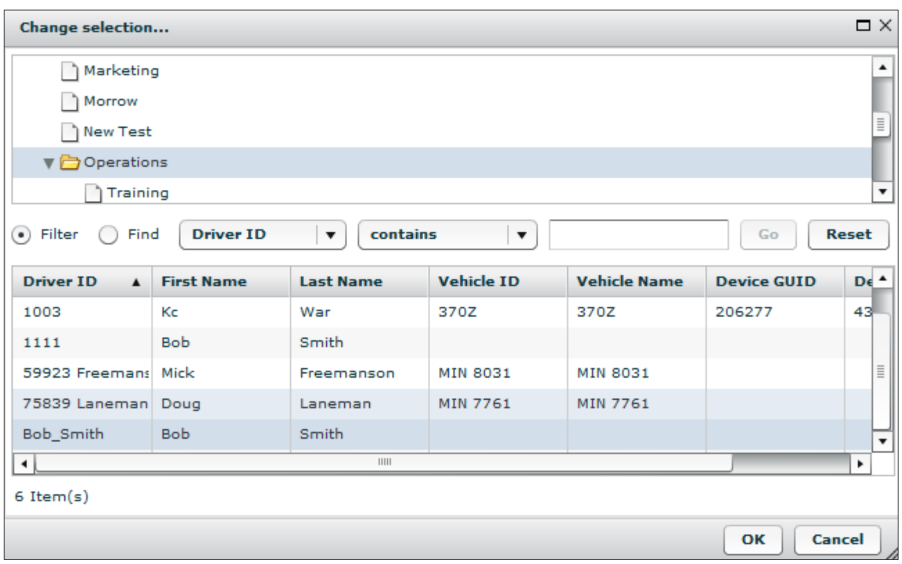


Figure 33: Assign Driver Screen

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.

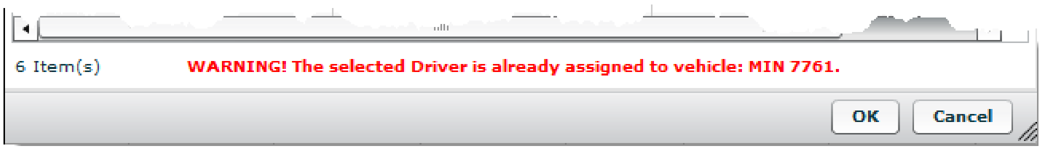


Figure 34: Warning Message - Driver Selection

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

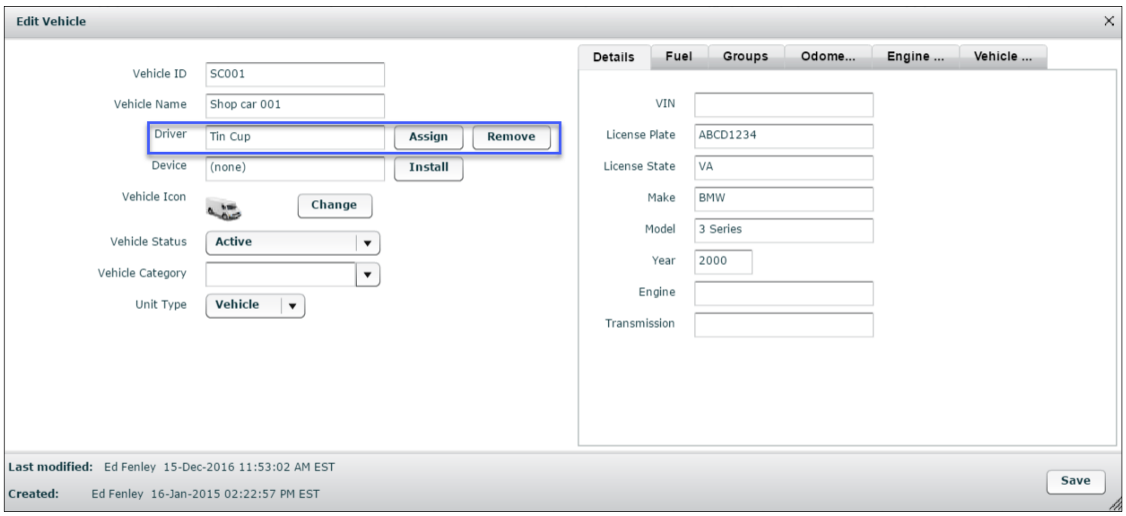


Figure 35: Driver Assigned

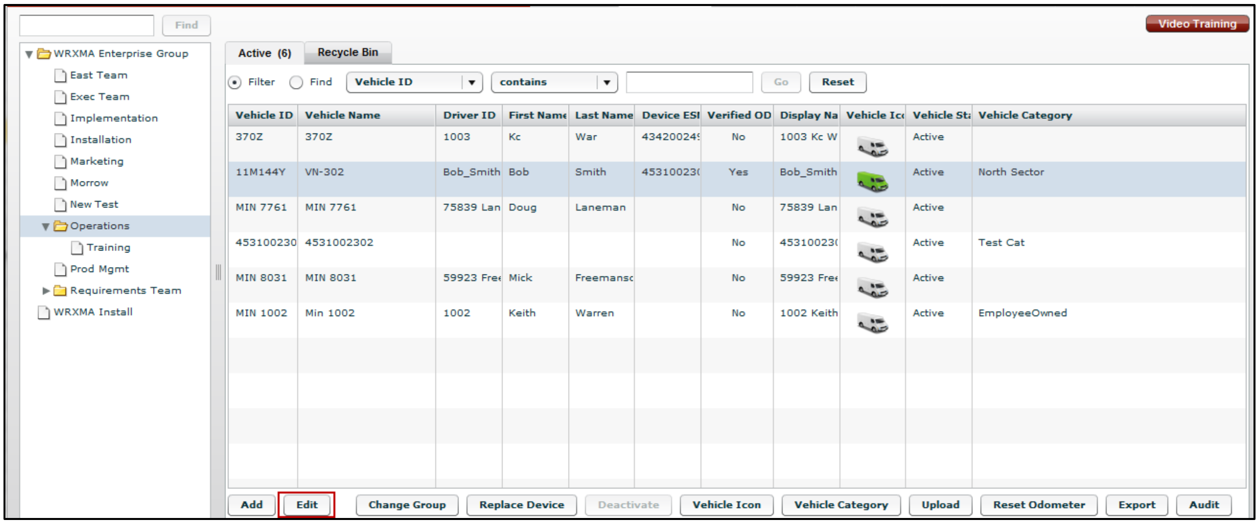
7. Click the **Save** button.

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.

<u>To Remove a Driver from an Assigned Vehicle:</u>

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.



- The Edit Vehicle screen displays.

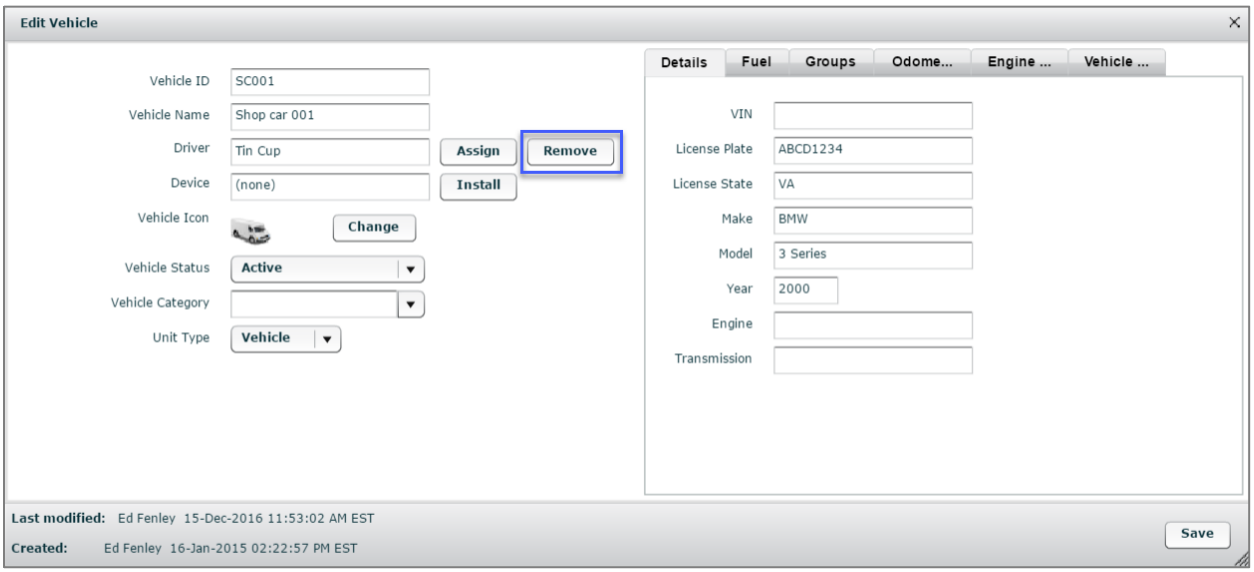


Figure 36: Edit Vehicle Settings - Remove Driver

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.

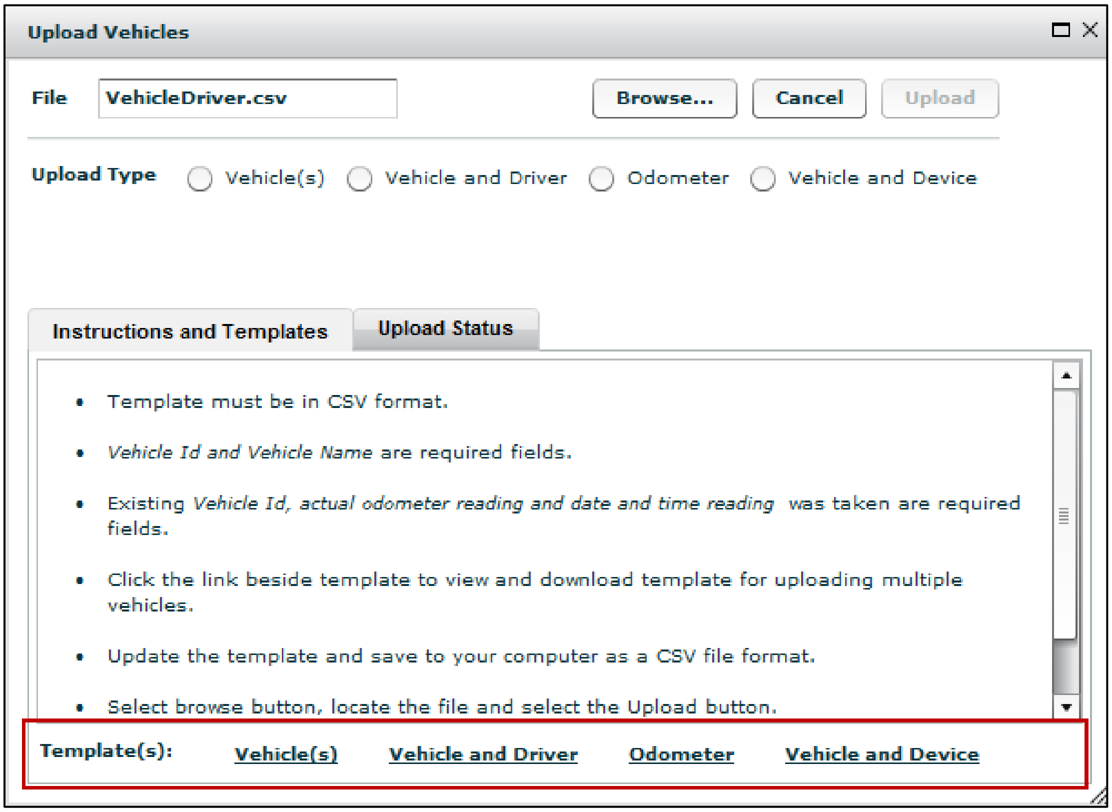


Figure 37: Vehicle Bulk Upload Templates

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.

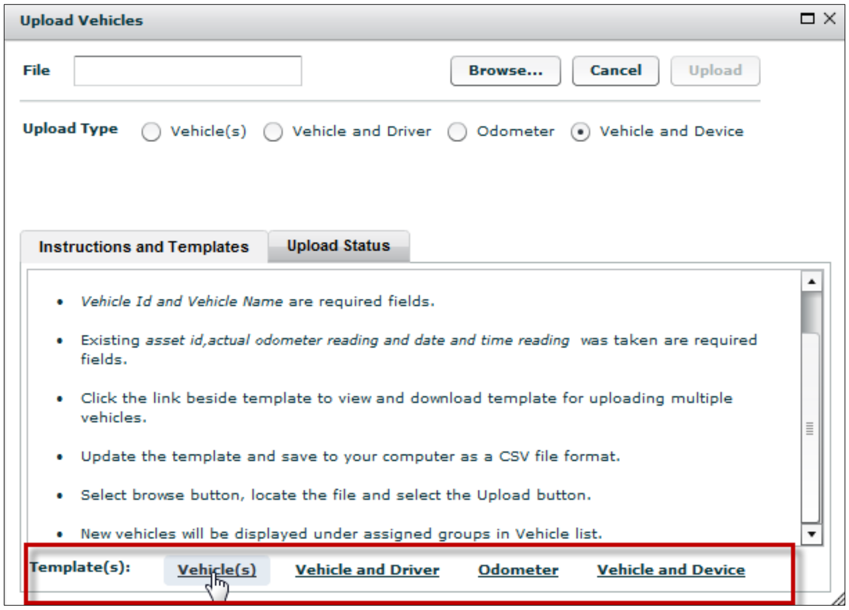
Vehicle and Device – Use the Vehicle and Device template, to create vehicles and create device-to-vehicle assignment at the same time. All fields are required. You cannot use this template if the Vehicle IDs exist in either the Active list or the Deactivated list.

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

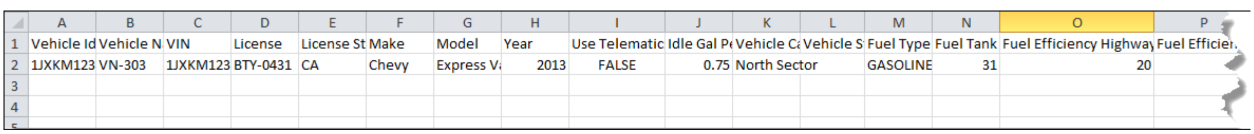
To Bulk Upload Vehicles:

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.



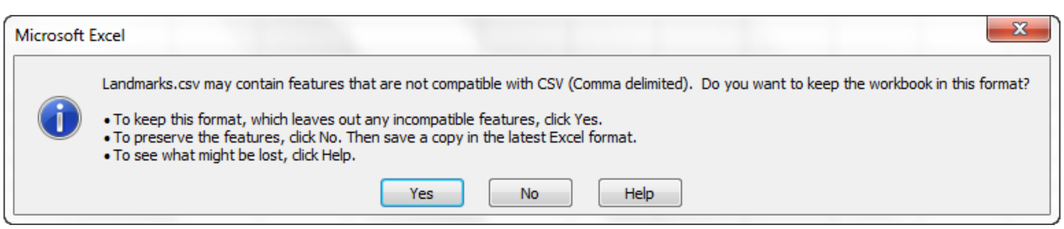
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Vehicle Id	Vehicle N	VIN	License	License St	Make	Model	Year	Use Telematic	Idle Gal Pe	Vehicle Ca	Vehicle S	Fuel Type	Fuel Tank	Fuel Efficiency Highway	Fuel Efficien
2	1JXKM123	VN-303	1JXKM123	BTY-0431	CA	Chevy	Express Va	2013	FALSE	0.75	North Sector		GASOLINE	31	20	
3																
4																

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.



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.

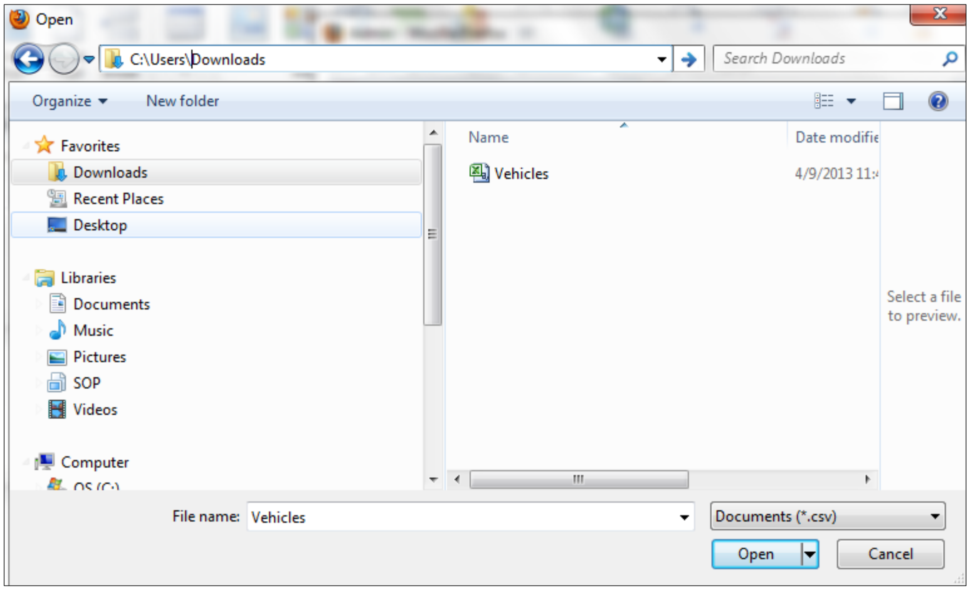


Figure 38: Open Saved Vehicle Template

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.

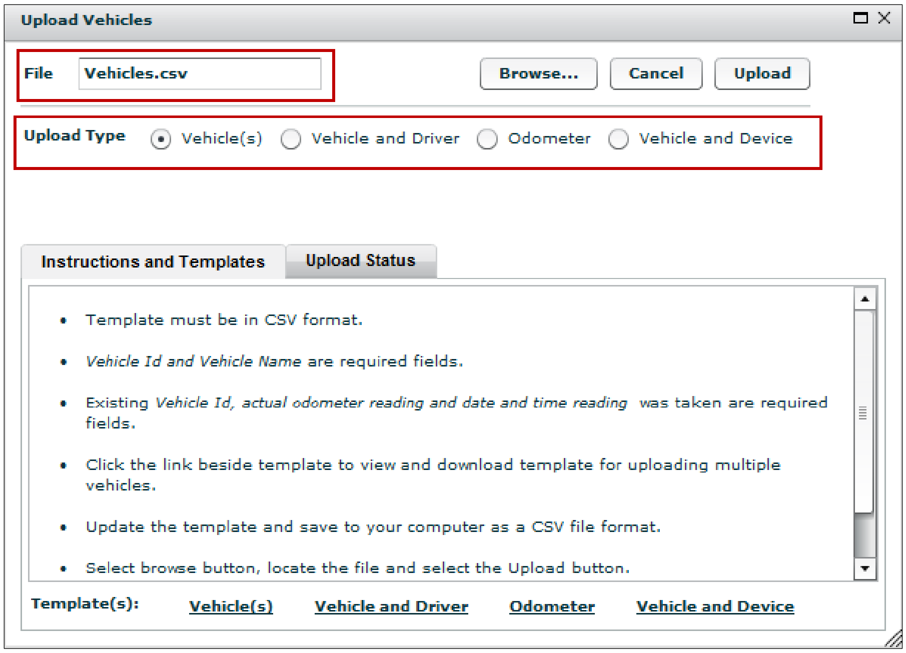


Figure 39: Upload Saved Vehicle Data

11. Click the **Upload** button.

- FleetOutlook uploads the vehicles and displays the Upload Status tab.

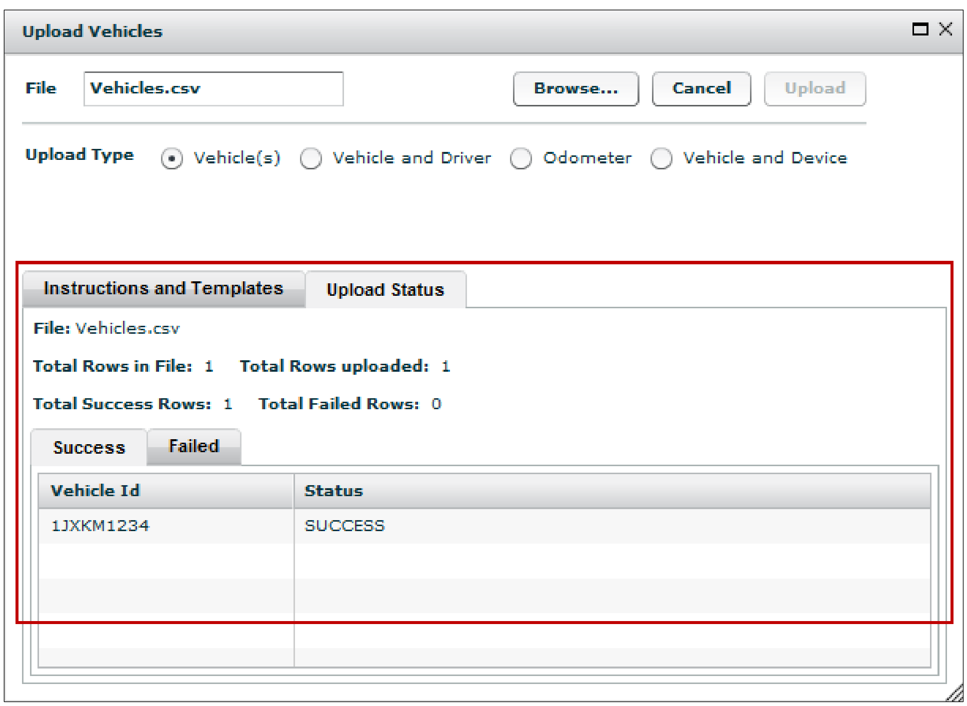


Figure 40: Upload Status Tab

- 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.

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Vehicle ID</td><td>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.</td></tr>
<tr><td>Vehicle Name</td><td>Vehicle Name is a required field and is used to identify the vehicle within the FleetOutlook application.</td></tr>
<tr><td>VIN</td><td rowspan="5">Vehicle Detail fields are used to provide a more in-depth description of the vehicle. They are not required fields, but used in some FleetOutlook reports.</td></tr>
<tr><td>License State</td></tr>
<tr><td>Make</td></tr>
<tr><td>Model</td></tr>
<tr><td>Year</td></tr>
<tr><td>Use Telematics</td><td>Currently not used. Leave blank.</td></tr>
<tr><td>Idle Gas Per Hour</td><td>Currently not used. Leave blank.</td></tr>
<tr><td>Vehicle Category</td><td>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.</td></tr>
<tr><td>Vehicle Status ID</td><td>Currently not used. Leave blank.</td></tr>
<tr><td>Fuel Type</td><td rowspan="5">Fuel fields are used to provide a detailed view of fuel efficiency amount the vehicles in your fleet. These fields are not required; however, they are used in the Fuel Efficiency report for vehicles with a device assigned that reports OBD-II vehicle bus data.</td></tr>
<tr><td>Fuel Tank Capacity</td></tr>
<tr><td>Fuel Efficiency Highway</td></tr>
<tr><td>Fuel Efficiency City</td></tr>
<tr><td>Fuel Efficiency Combined</td></tr>
</table>

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 categories.
2nd Driver Category ID	

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.

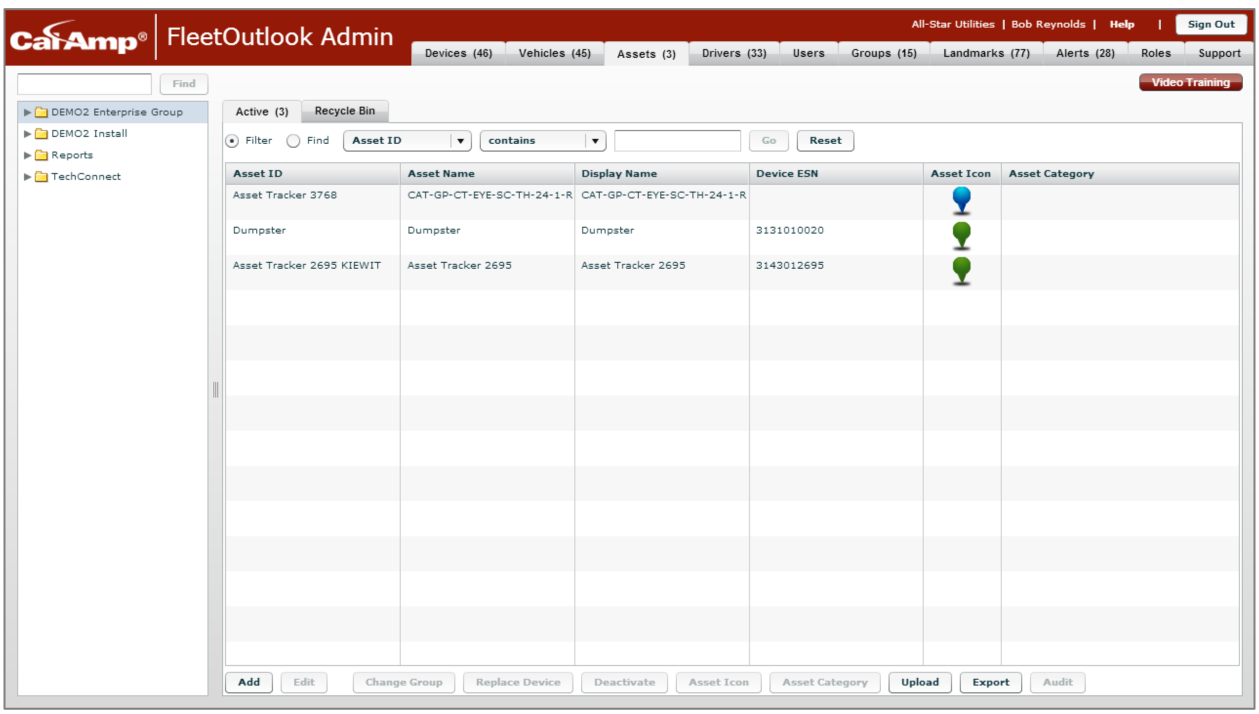
<u>Note:</u> To enable the Assets tab, contact CalAmp's Technical support by phone: 1-866-456-7522 or by email: solutionsupport@calamp.com.

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.



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

Figure 41: Asset Admin Options

- **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.

<u>To Add or Edit an Asset:</u>

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.

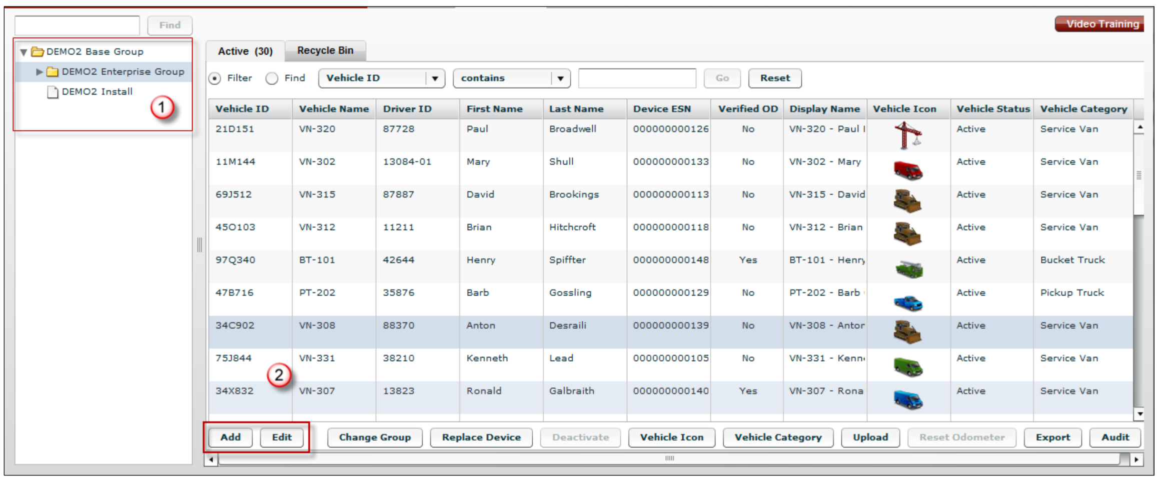


Figure 42: Active Asset - Add New Asset/Edit Existing Asset

- 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.

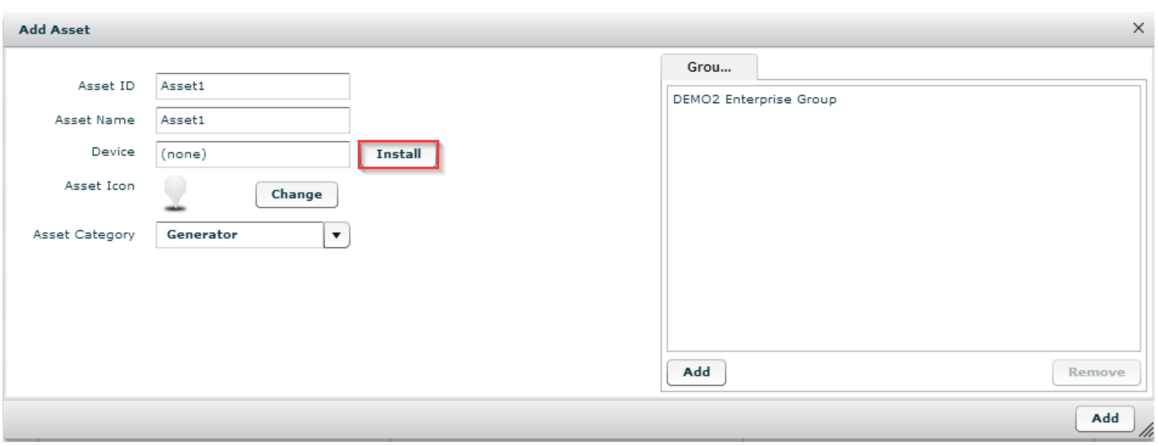


Figure 43: Add Asset Screen

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.

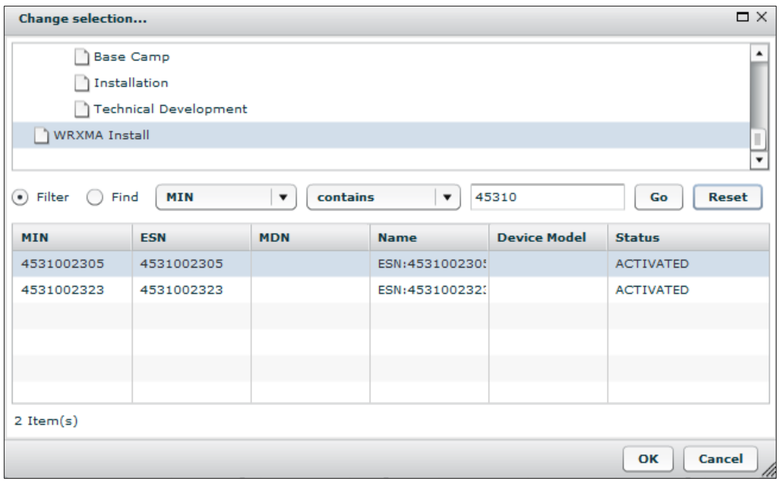


Figure 44: Assign Device Screen

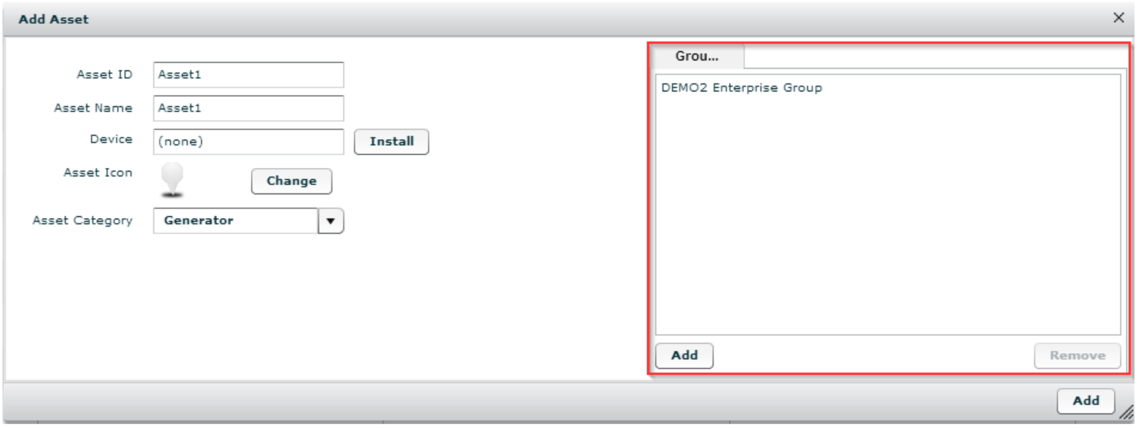
6. From the top pane, scroll to the bottom of the list and select the **Install** group.

- 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.



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.

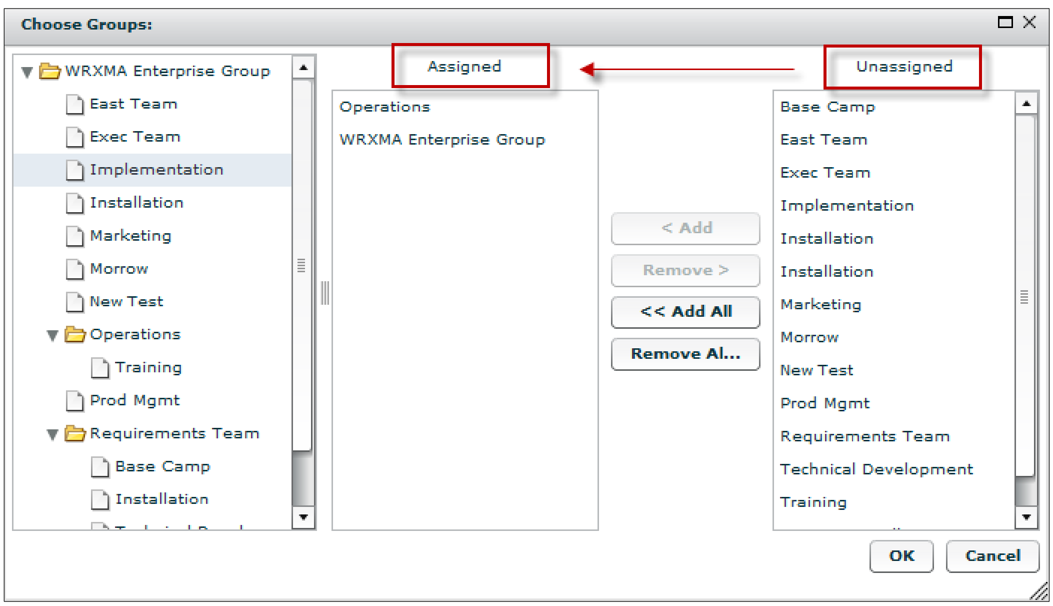


Figure 45: Choose Group Screen

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 Vehicle Icons and Colors 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:

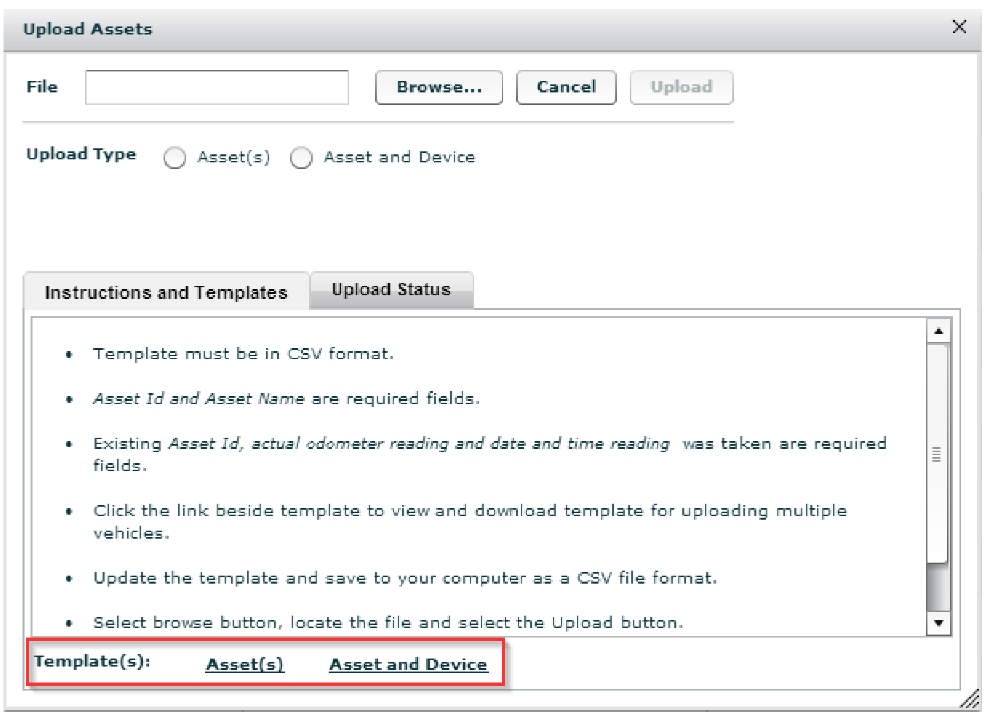
Asset(s) – Use for the upload of asset specific data, Asset ID and Asset Name are required fields. If the Asset ID has been used in the past, an error will result if you attempt to upload the same Asset ID. Asset Category is optional.

Asset and Device – Use the Asset and Device template, to create asset and create device-to-asset 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.



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.

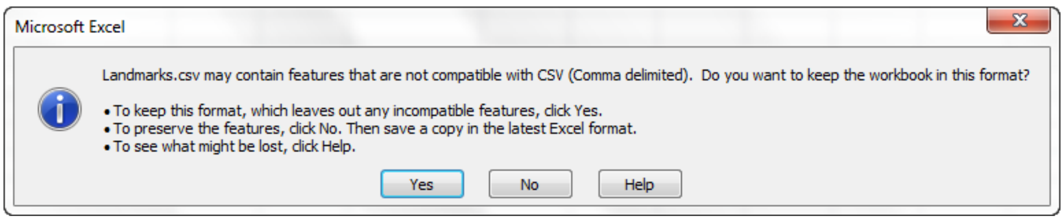
	A	B	C	D	E	F
1	Asset Id	Asset Name	Asset Category Id			
2	asset-1	asset-test-name-1	North Sector			
3	asset-2	asset-test-name-2	West Sector			
4						

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.



- 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.

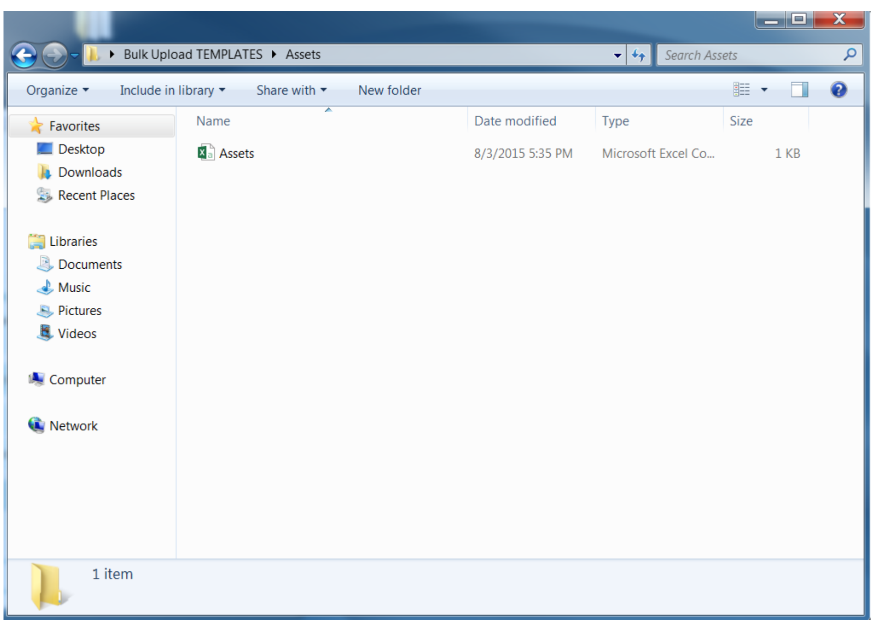


Figure 46: Open Saved Asset Template

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.

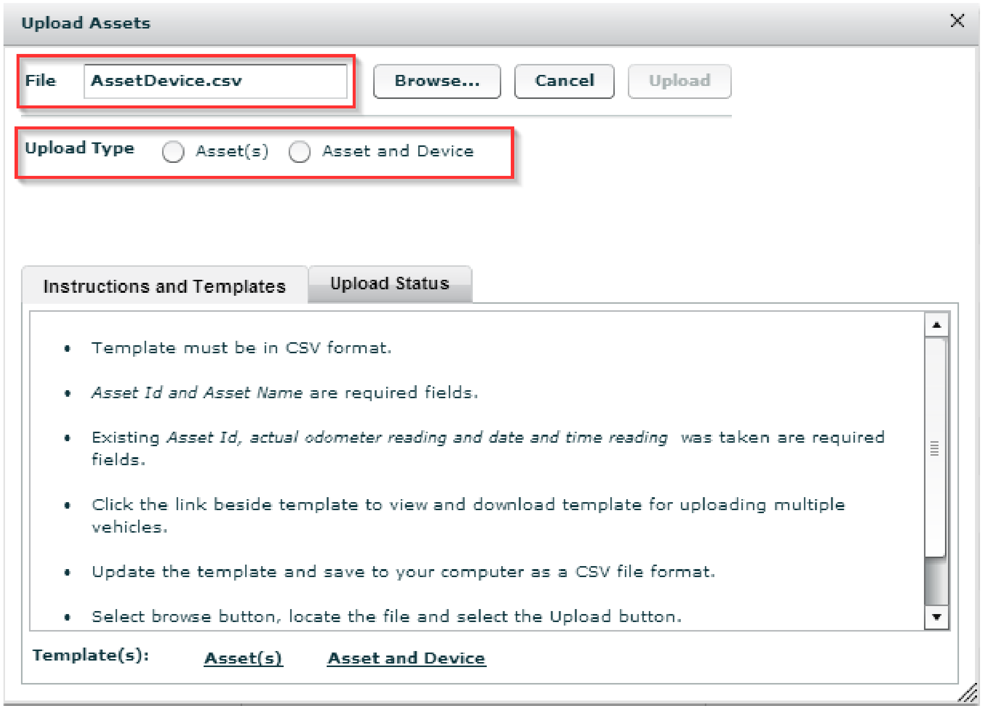


Figure 47: Upload Saved Vehicle Data

10. Click the **Upload** button.

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

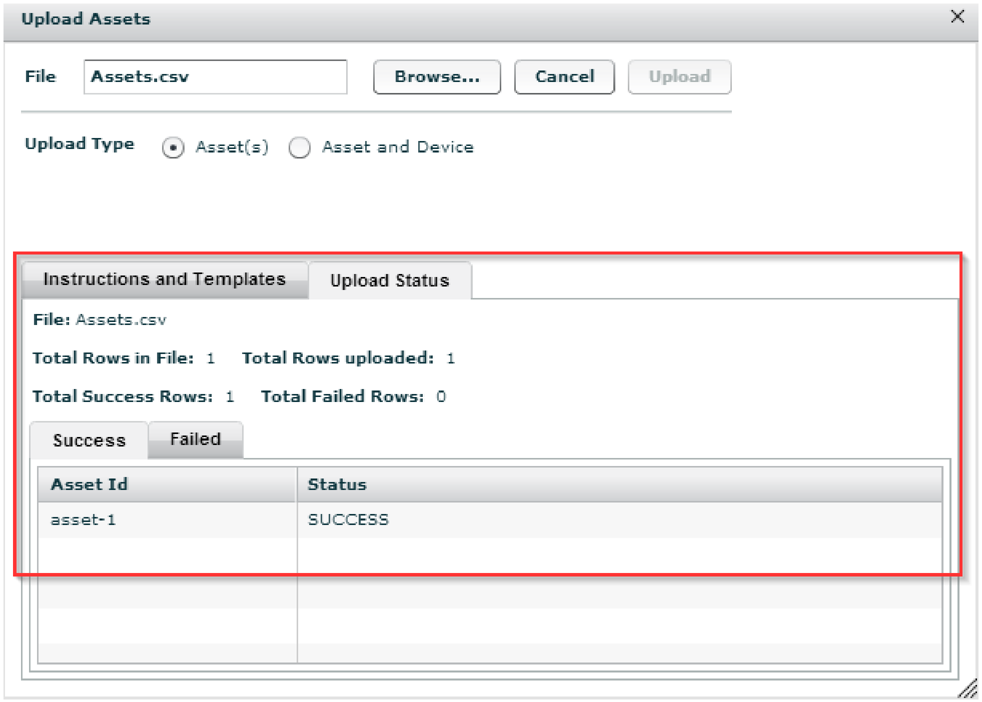


Figure 48: Upload Status Tab

- 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.

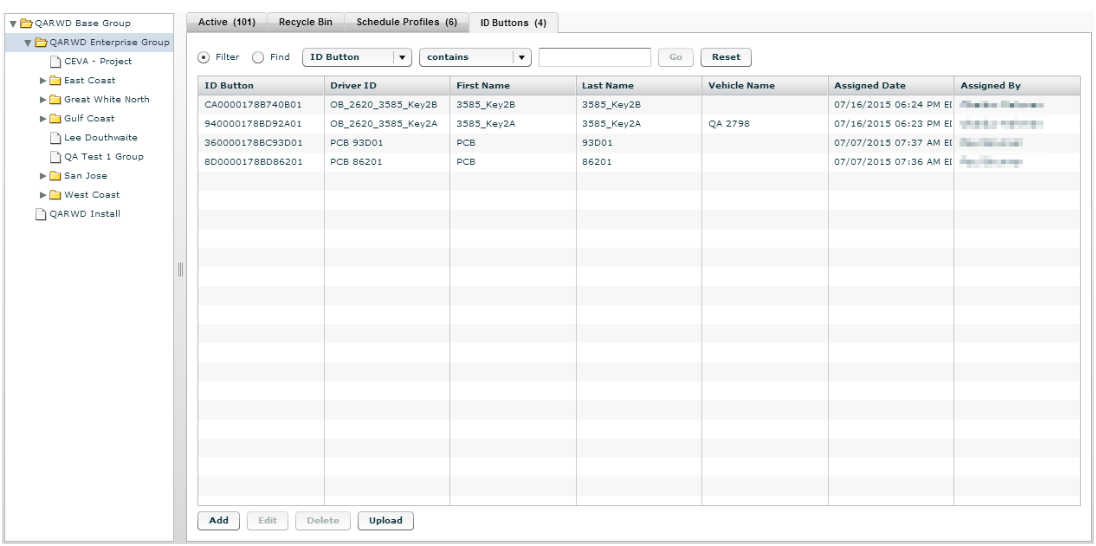


Figure 49: Drivers

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.

Figure 50: Driver - Active Tab Options

Figure 51: Driver - Recycle Bin Tab Options

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.

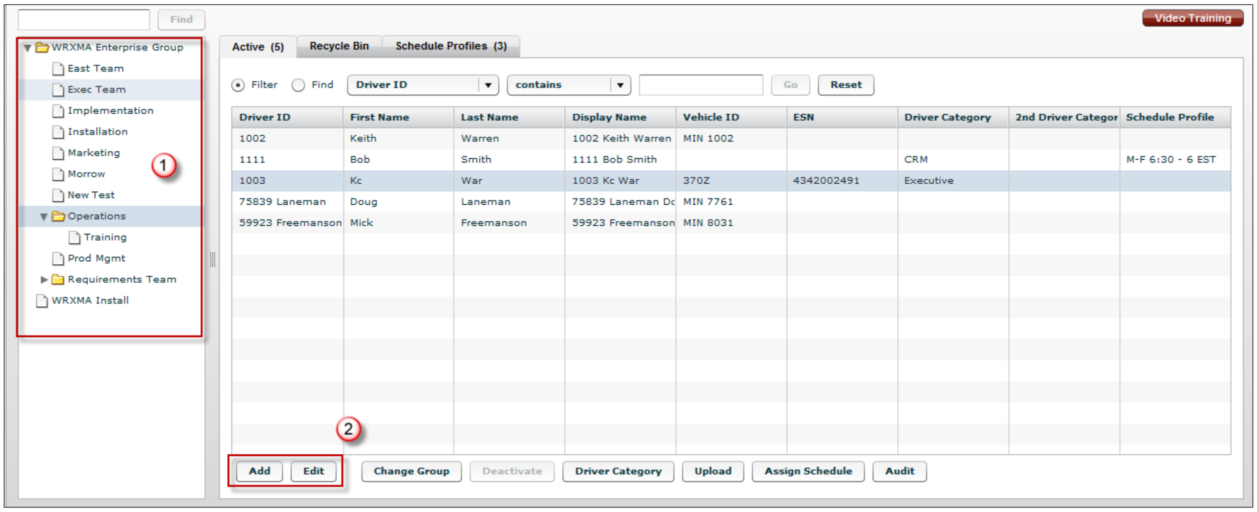


Figure 53: Active Drivers - Add New Driver/Edit Existing Driver

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.

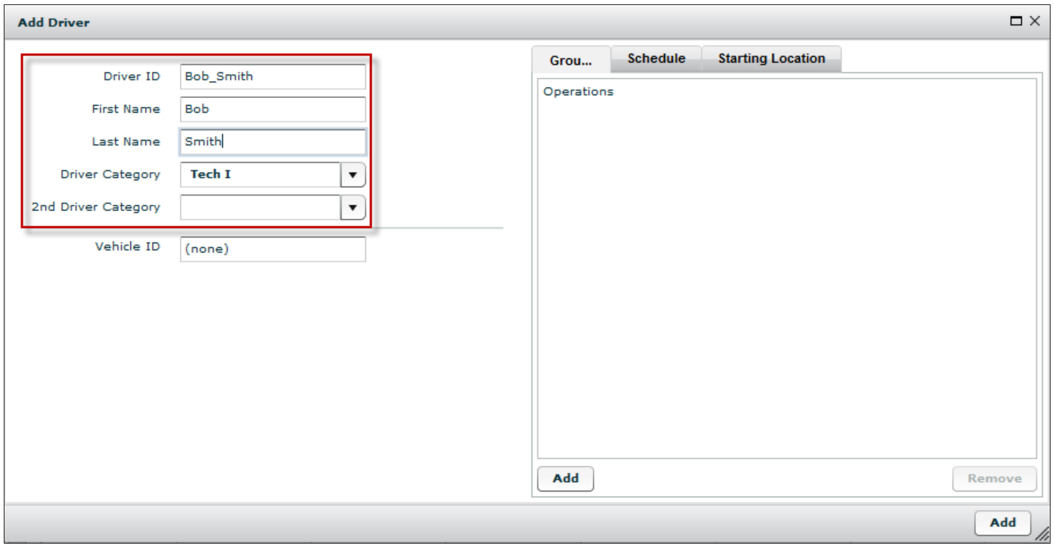


Figure 54: Add Driver Screen

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.

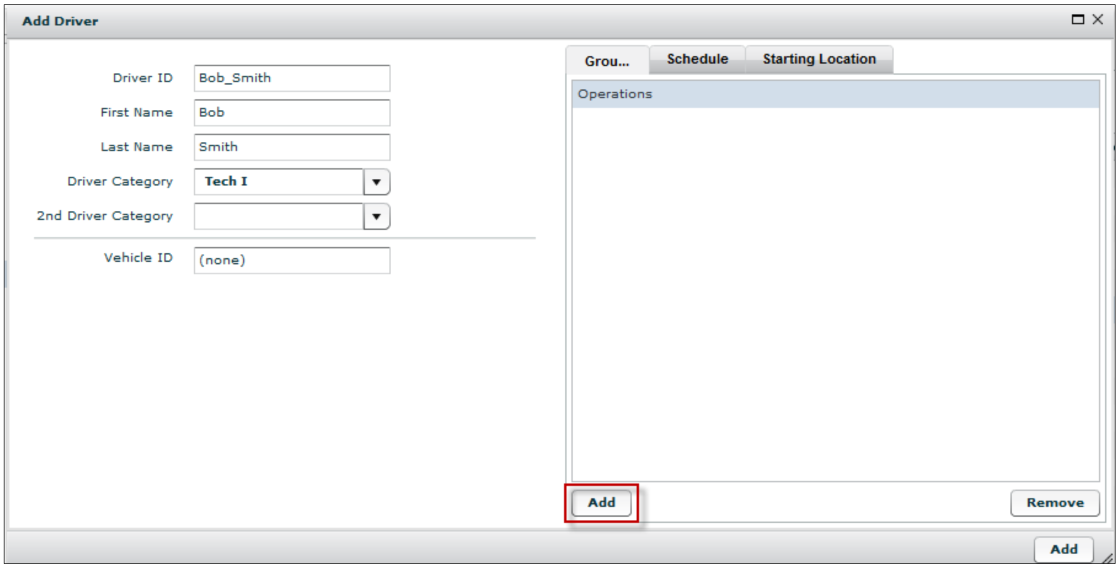


Figure 55: Add Driver Groups Button

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.

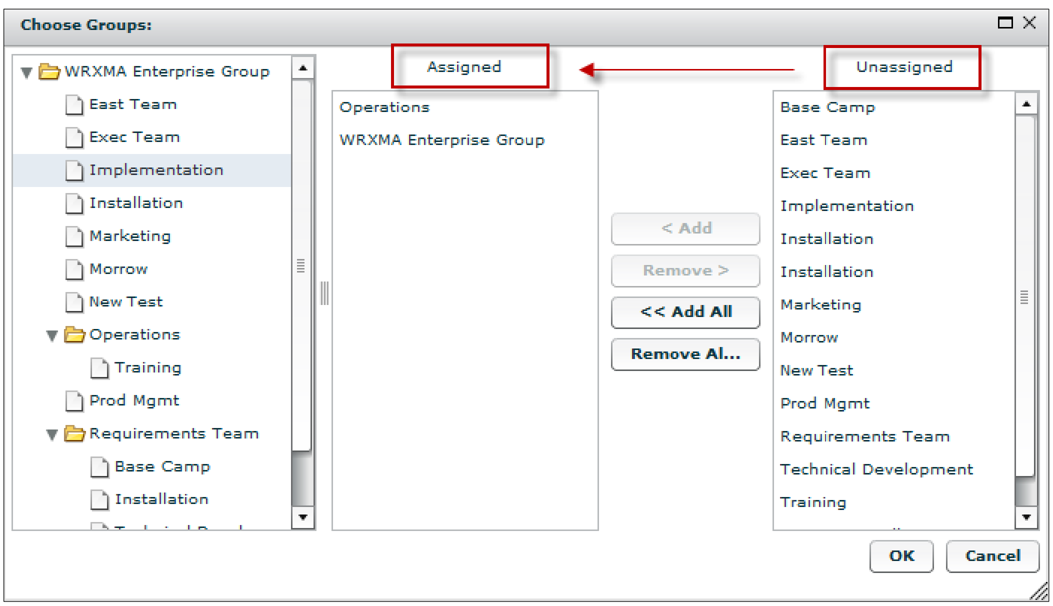


Figure 56: Choose Driver Groups Screen

- 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.

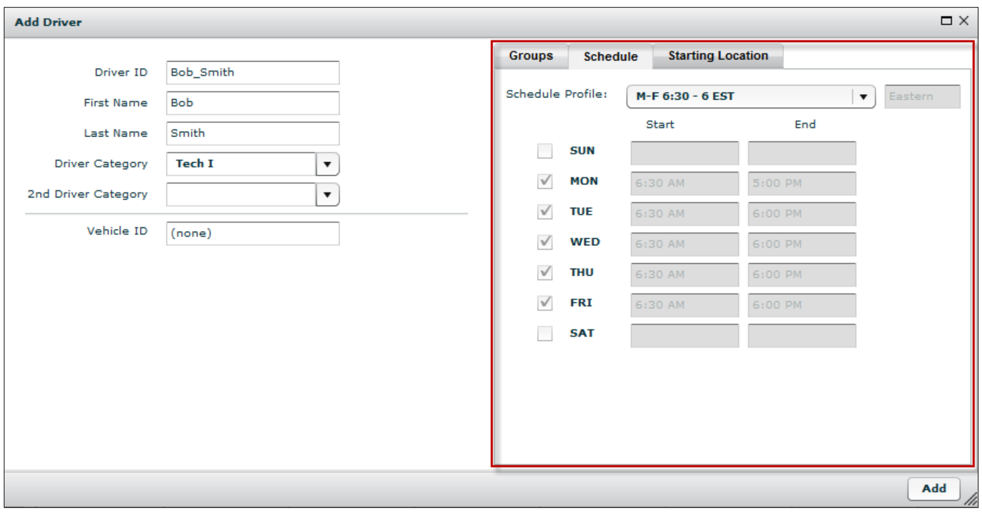


Figure 57: Add Driver Screen - Select Schedule Profile

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.

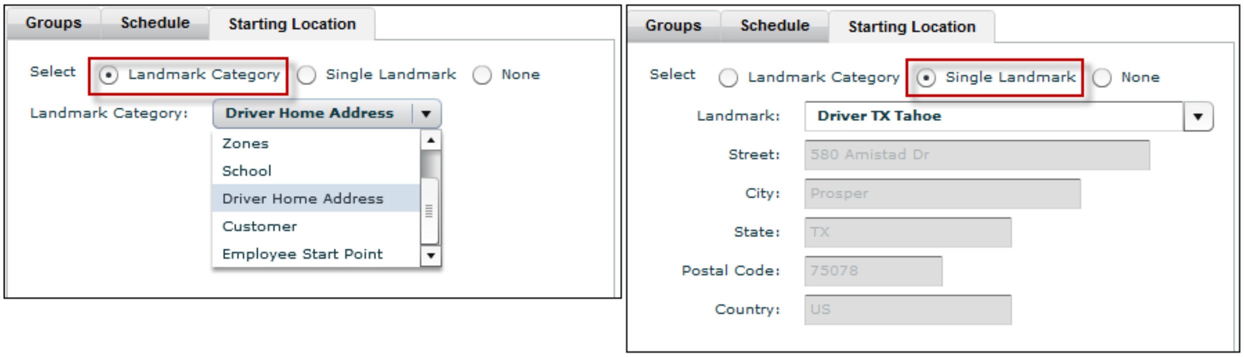


Figure 58: Add Driver Screen - Select Starting Location

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

Note: 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.

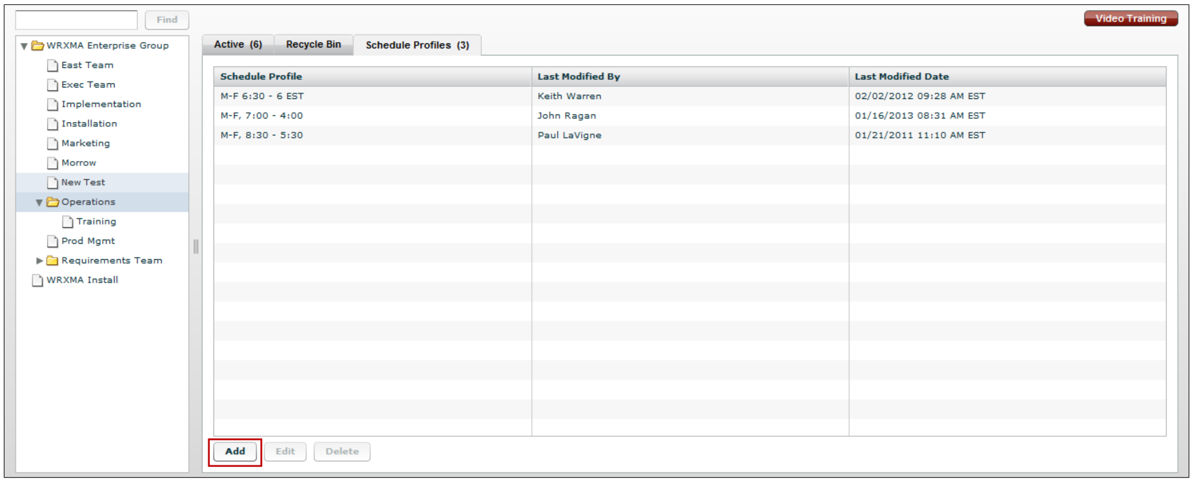


Figure 60: Drivers - Schedule Profiles Screen

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.

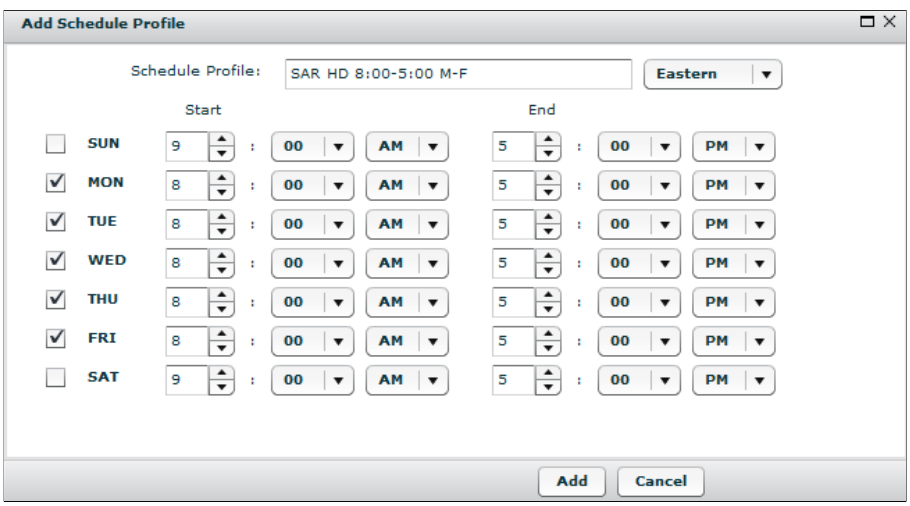


Figure 61: Add Schedule Profile

3. Enter the name in the **Schedule Profile** field, and then select a **Time Zone** from the drop-down 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.

Note: 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.

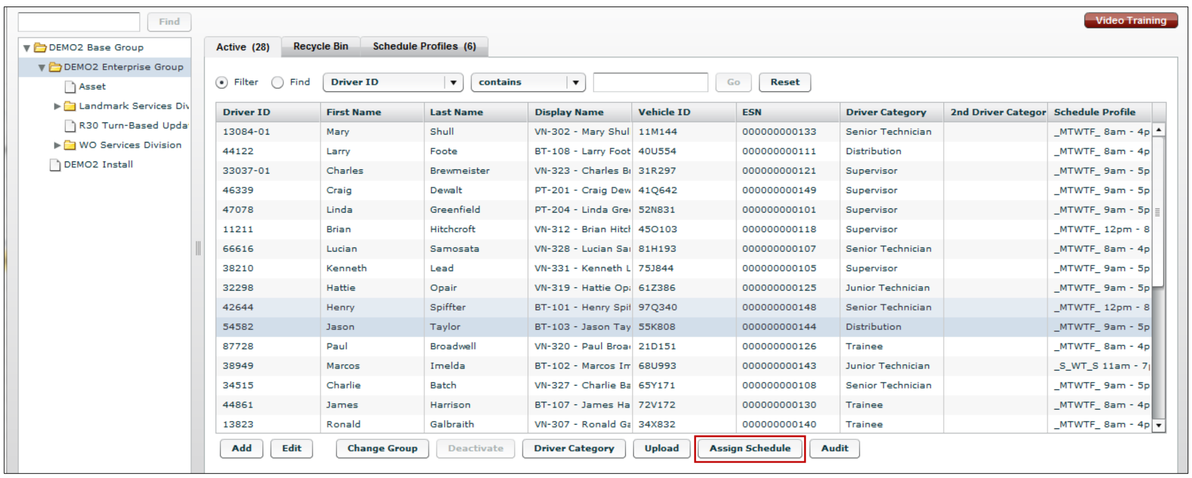


Figure 62: Drivers - Assign Schedule

2. Click the **Assign Schedule** button.

- The Assign Schedule Profile to Drivers screen displays.

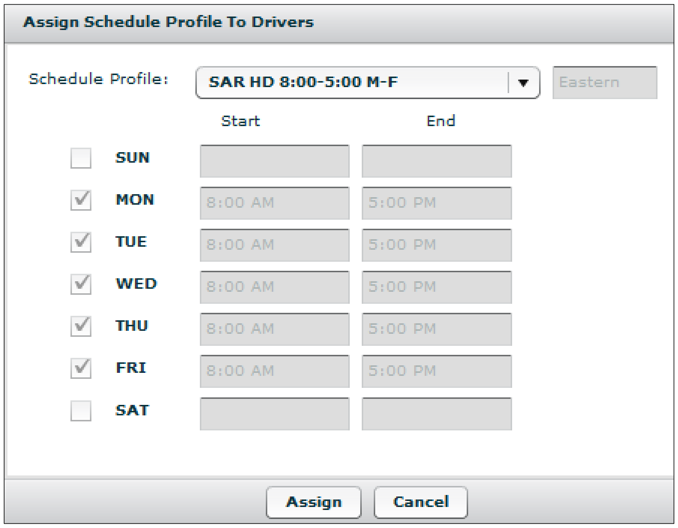


Figure 63: Assign Schedule Profile to Drivers Screen

3. Select a **Schedule Profile** from the drop-down list.

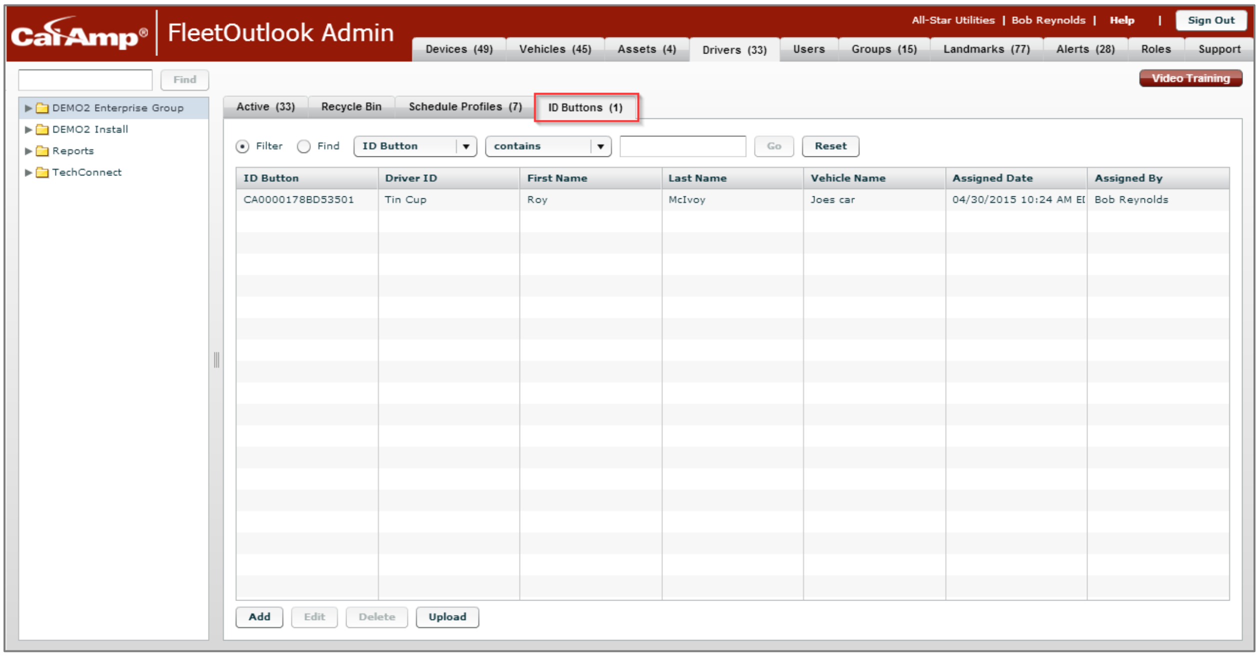
- FleetOutlook automatically selects the days and populates the start and end time fields based on the schedule profile selected.

4. Click the **Assign** button.

- FleetOutlook assigns the selected schedule profile to the driver.

9.4 ID BUTTONS

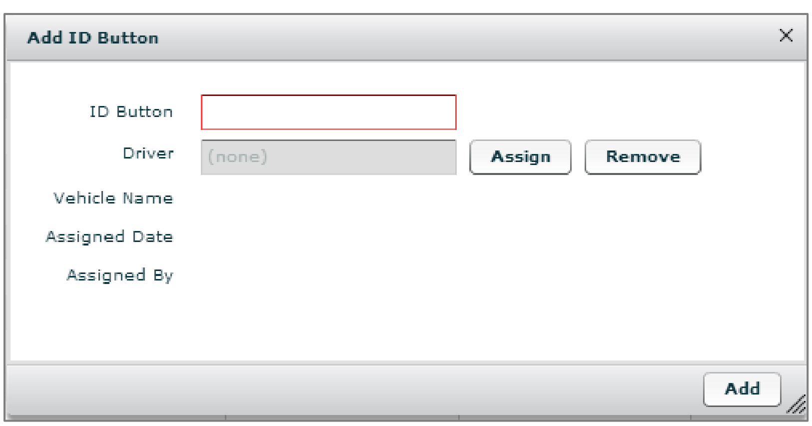
ID Buttons enable drivers to easily assign themselves to the vehicle they are operating. Each vehicle has a Key Reader connected to the CalAmp tracking device. When the driver enters a vehicle, they press the Keyfob against the Key Reader. This sends a message to FleetOutlook and automatically pairs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



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.



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.

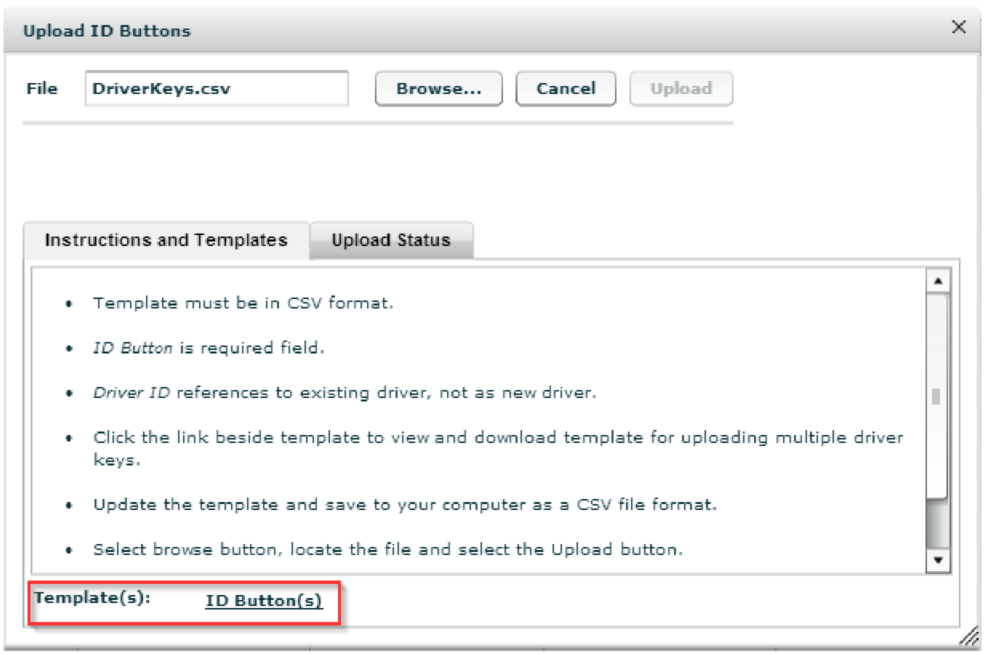
ID Button Bulk Upload.

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.



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.

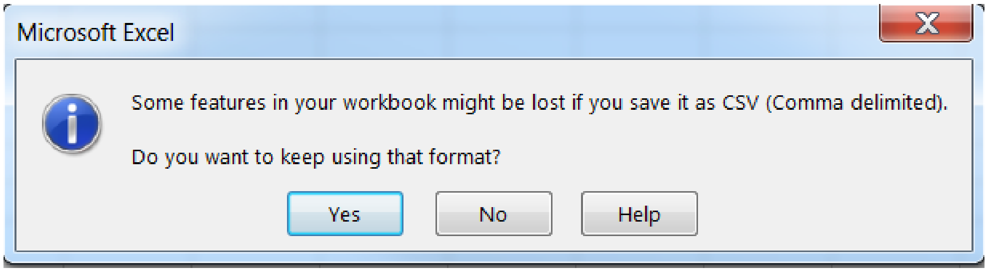
	A	B	C	D
1	Driver Key	Driver ID		
2	1234567890	Sample ID		
3				

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.

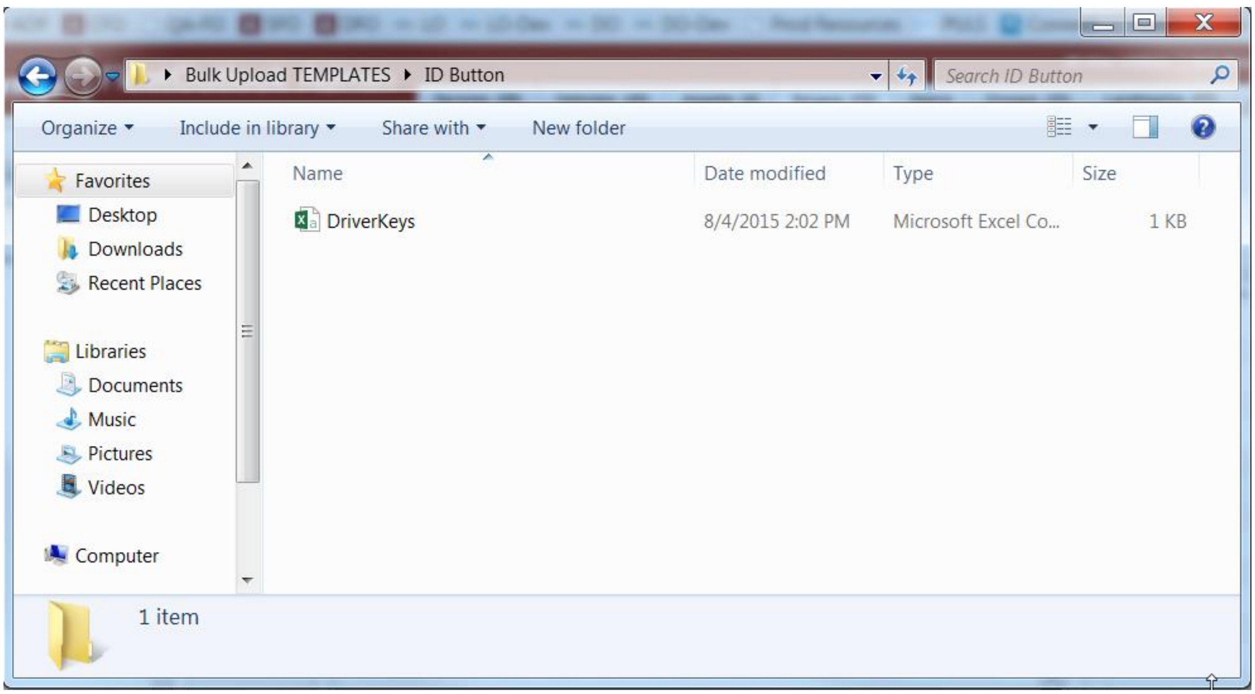


Figure 64: Open Saved Asset Template

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.

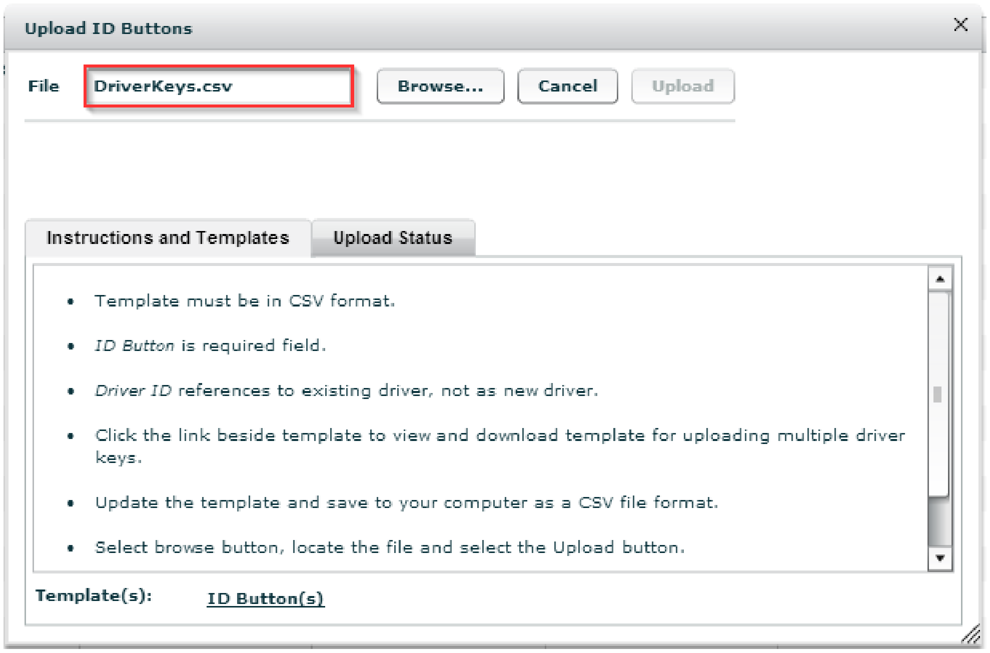


Figure 65: Upload Saved Vehicle Data

9. Click the **Upload** button.

- FleetOutlook uploads the ID Buttons and displays the Upload Status tab.

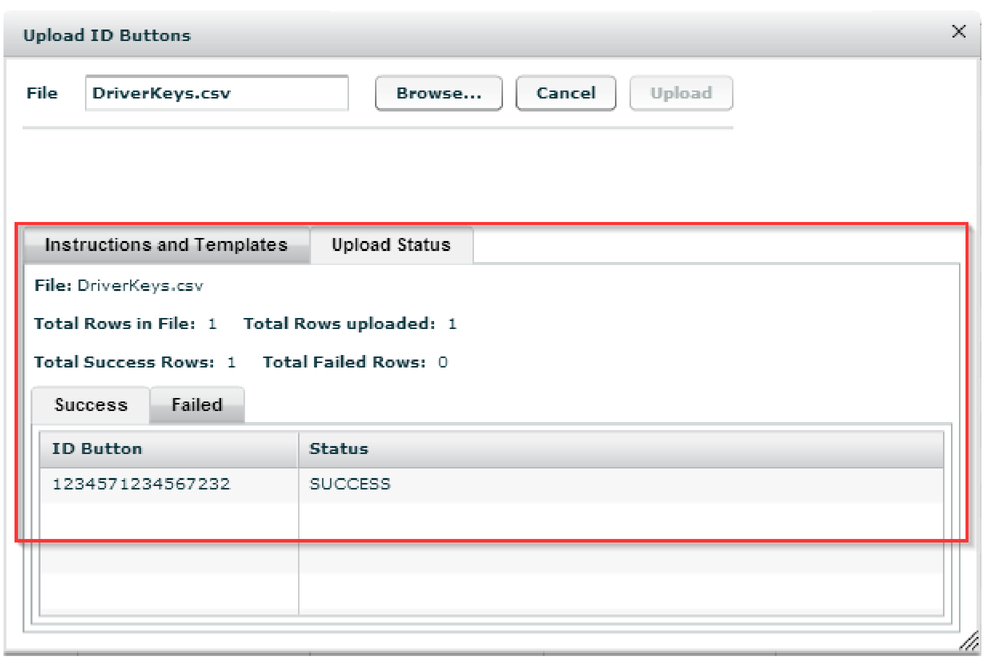


Figure 66: Upload Status Tab

- 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.

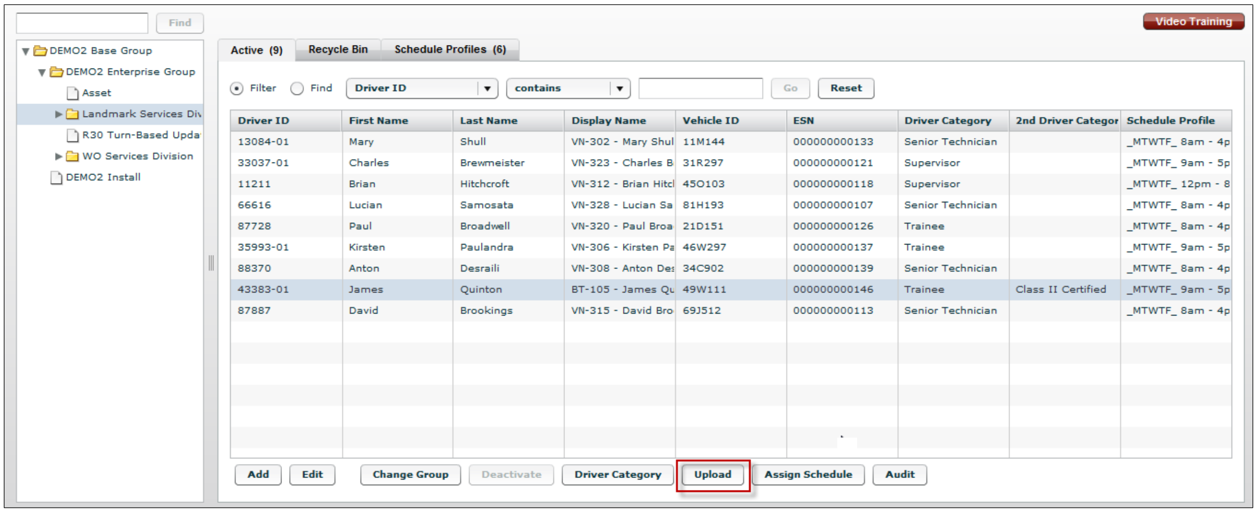


Figure 67: Driver Bulk Upload

2. Click the **Upload** button.

- The Upload Drivers screen displays.

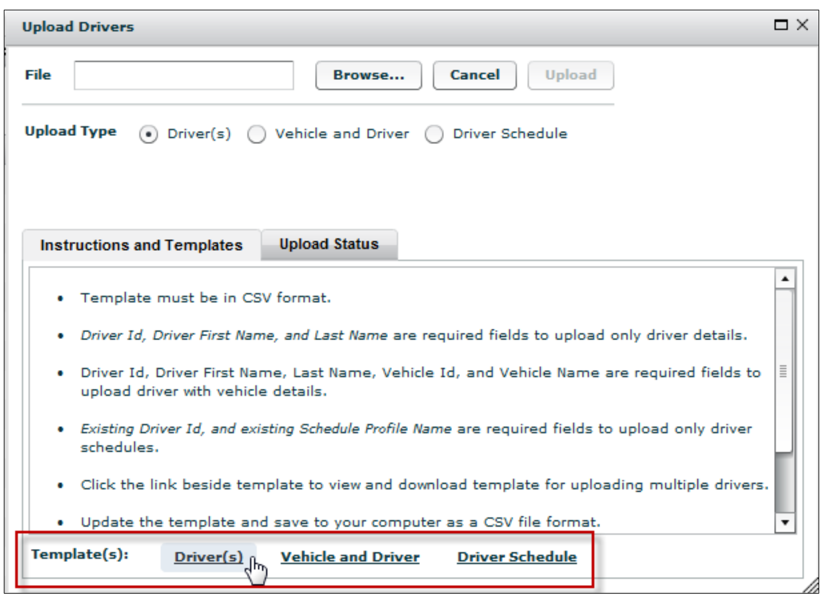


Figure 68: Upload Drivers Screen

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.

A	B	C	D	E	F	G
Driver Id	Driver First Name	Driver Last Name	Driver Category Id	2nd Driver 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.

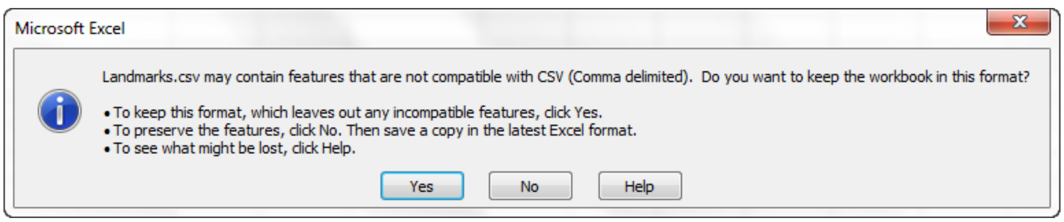


Figure 70: Excel Warning Message

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.

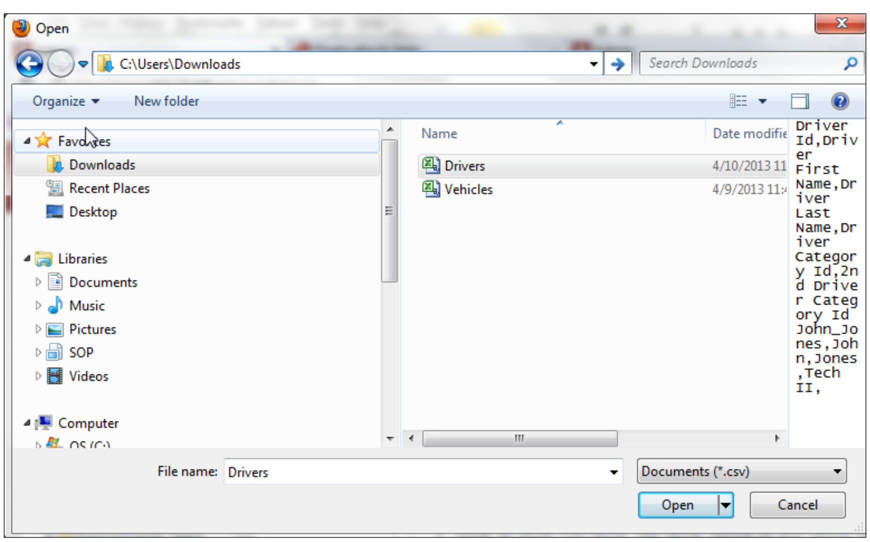


Figure 71: Open Driver Template

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.

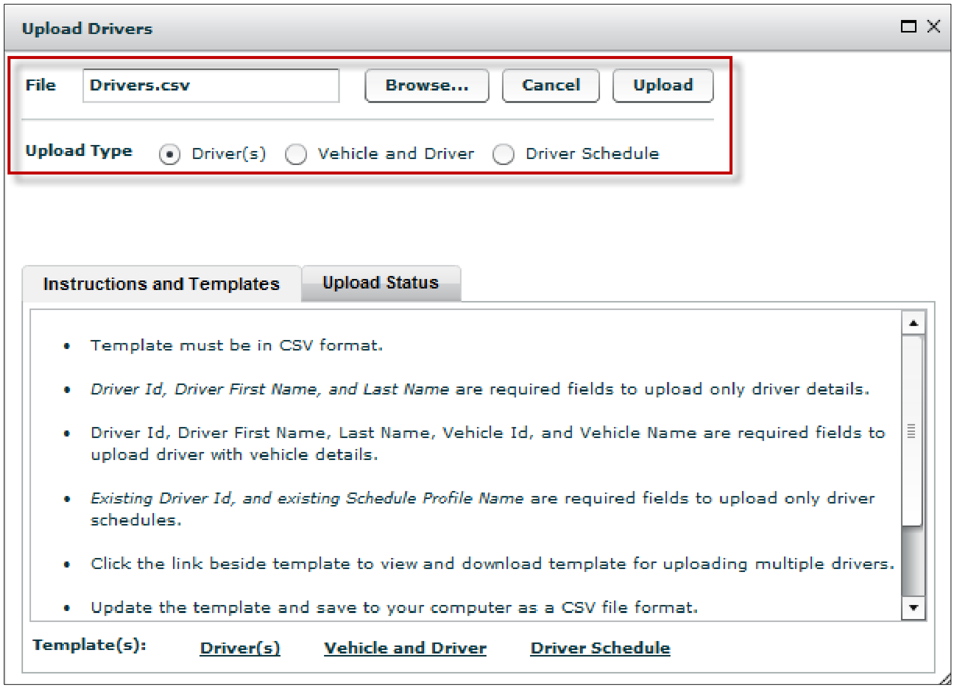


Figure 72: Upload Saved Driver Data

12. Click the **Upload** button.

- FleetOutlook uploads the drivers and displays the Upload Status tab.

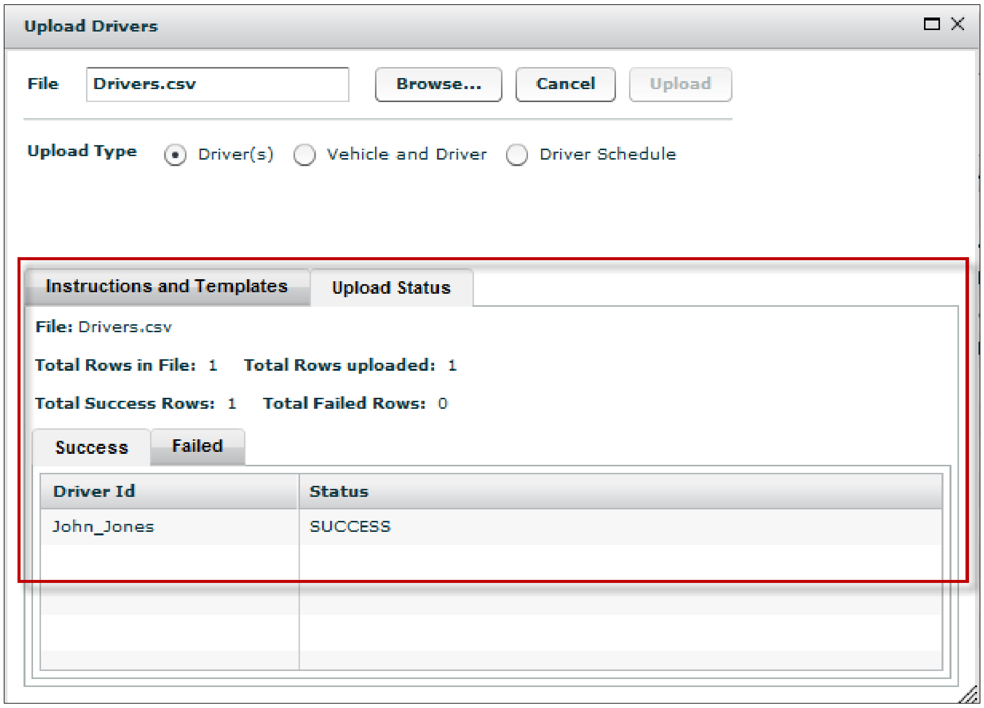


Figure 73: Driver Upload Status Tab

- 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 categories.
2nd Driver Category ID	

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 categories.
2nd Driver Category ID	

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.

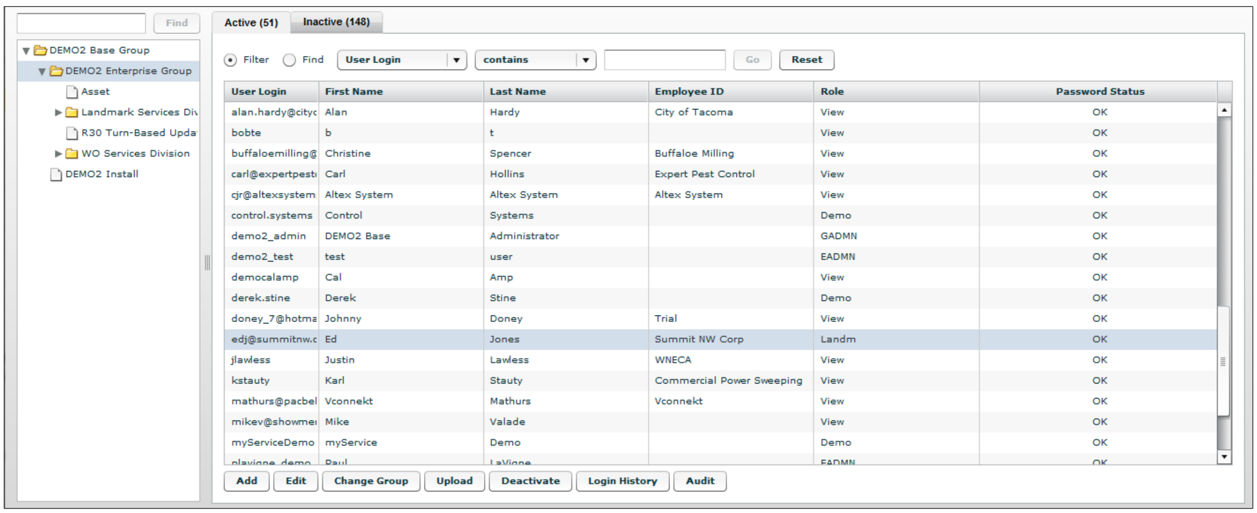


Figure 74: Users Screen

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 75: User - Active Tab Options

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.

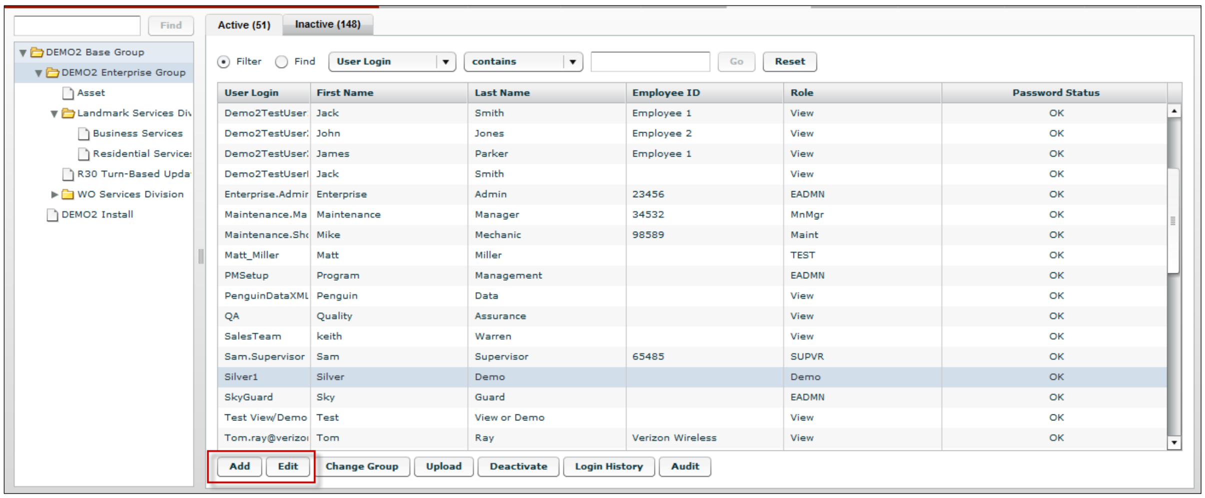


Figure 77: Active Users – Add New User/Edit Existing User

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.

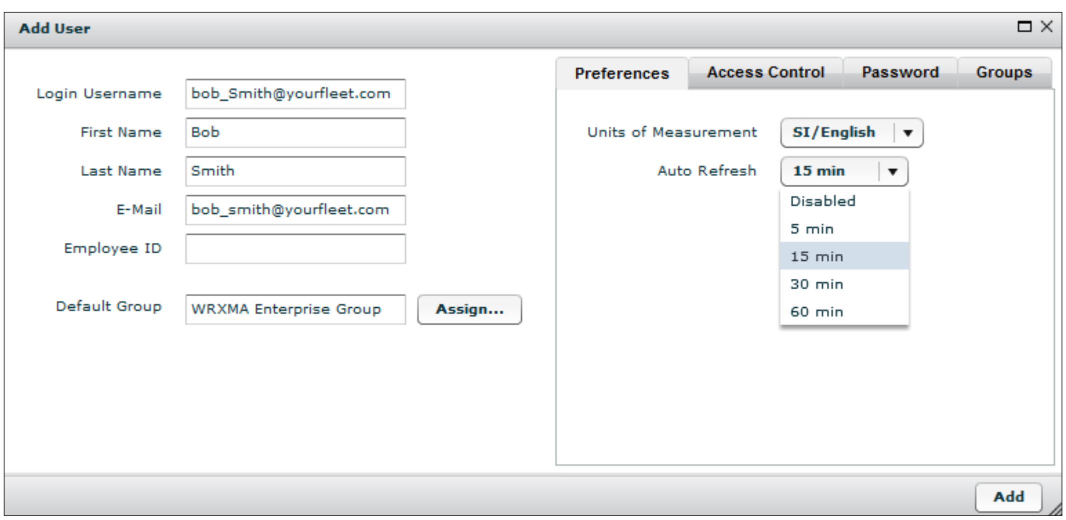


Figure 78: Add User Screen

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.

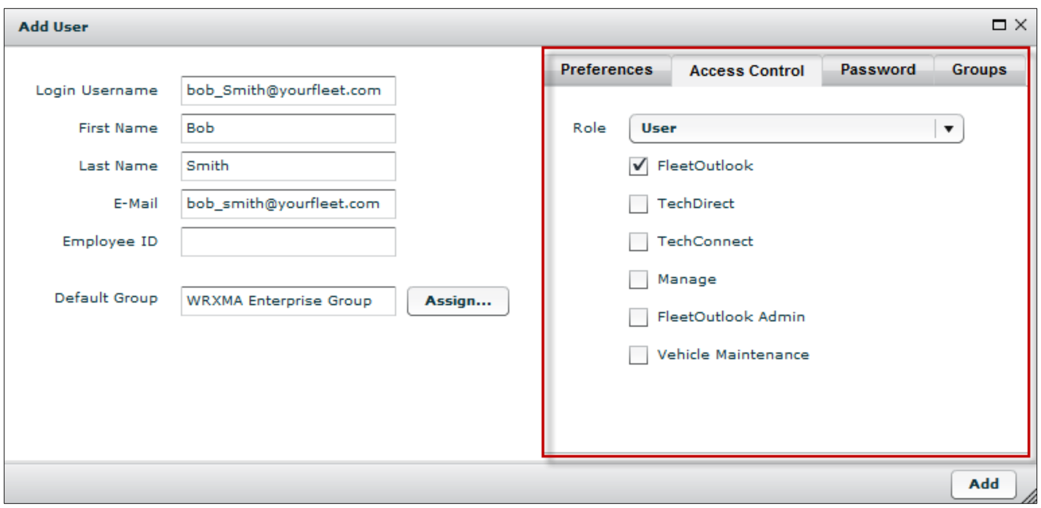


Figure 79: Add User - Access Control

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-to-vehicle 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.

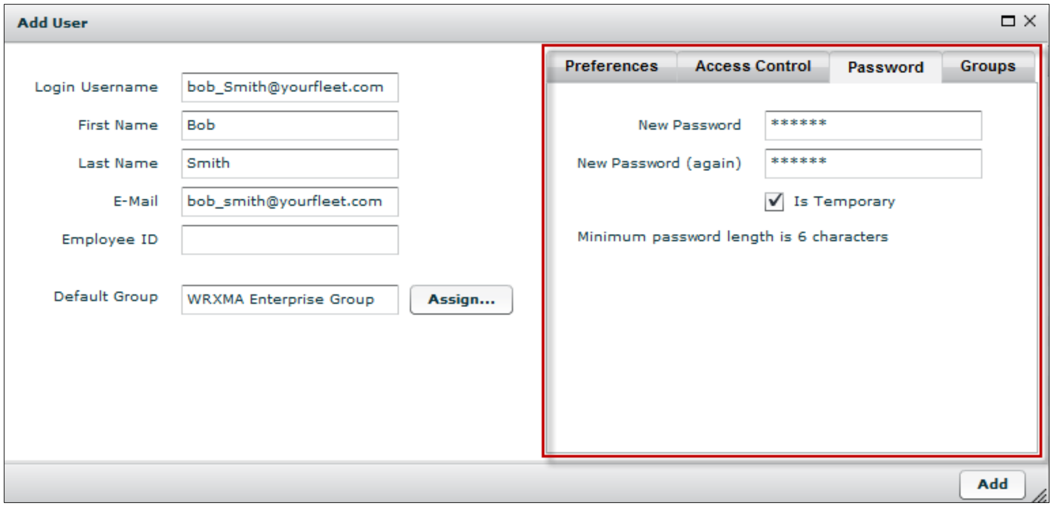


Figure 80: Add User - Password

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.

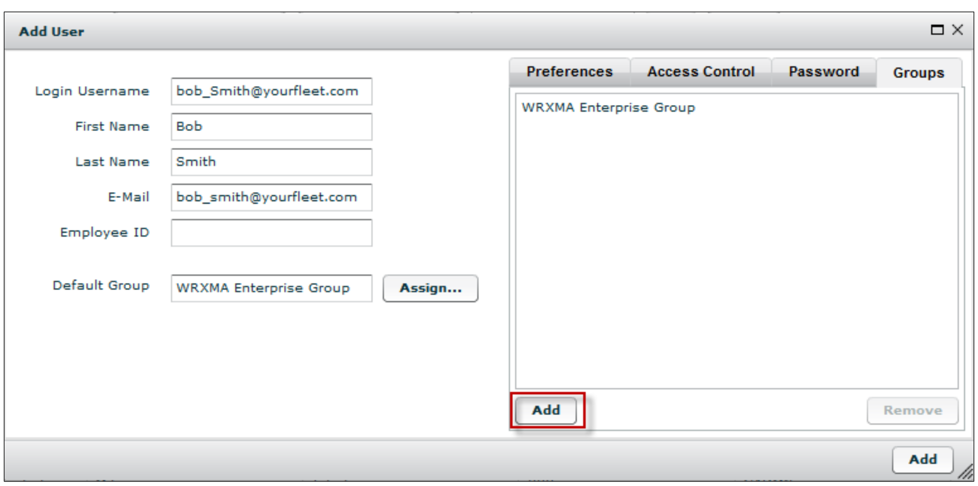


Figure 81: Add User - Groups

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.

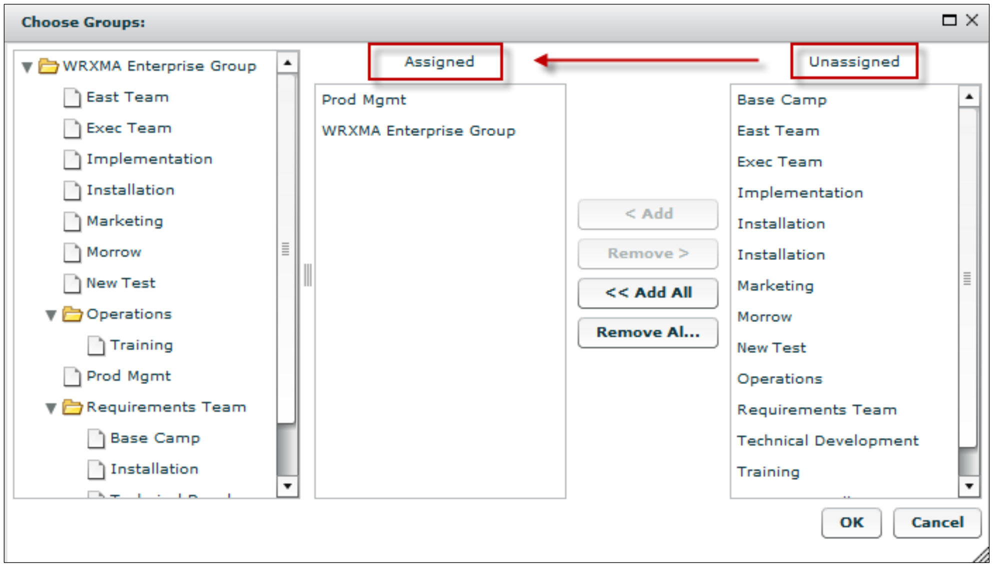


Figure 82: Assign Groups

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.

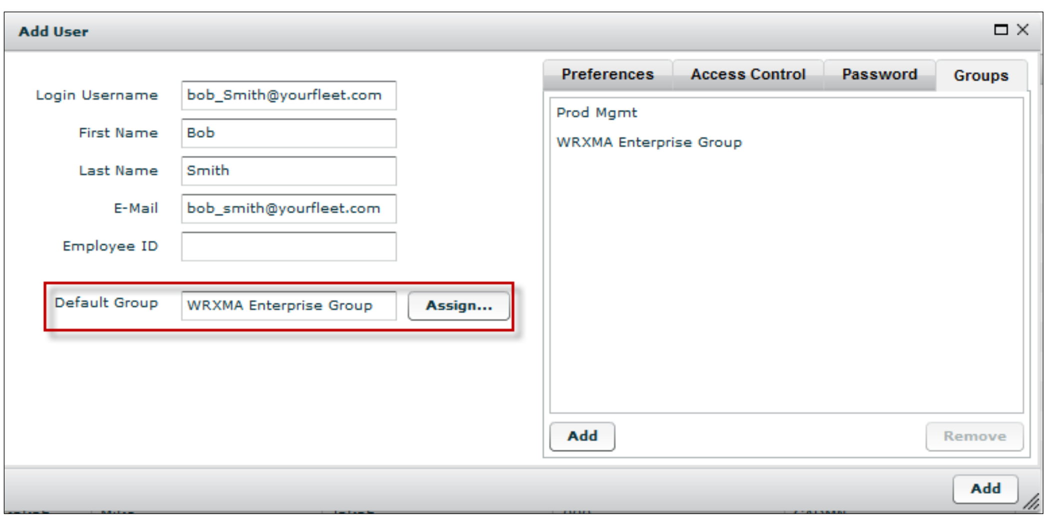


Figure 83: Add User - Assign Default Group Option

19. Click the **Assign** button for the **Default Group** field.

- The Change Selection screen displays.

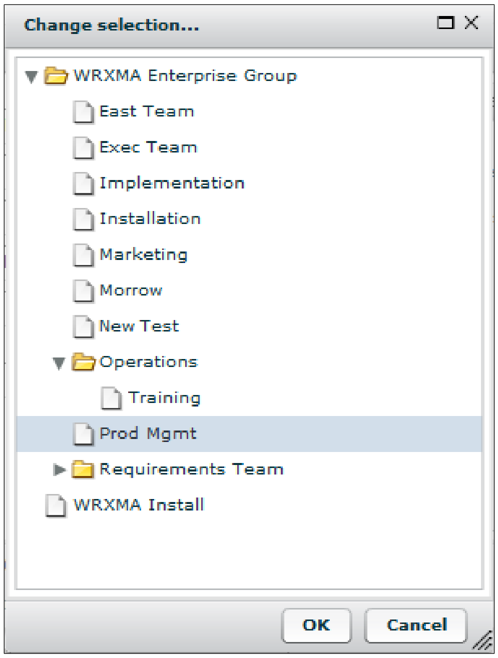


Figure 84: Select Default Group

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.

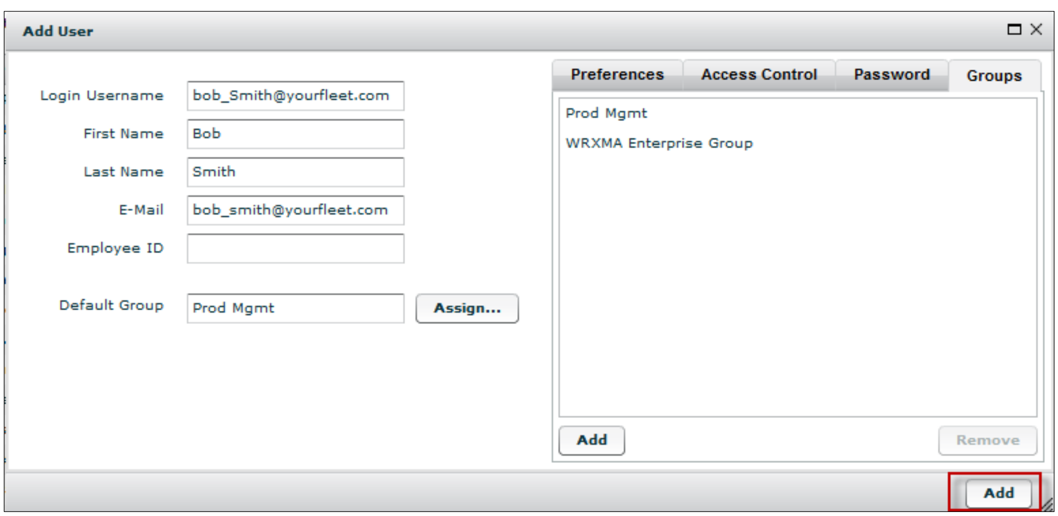


Figure 85: Add User Screen Complete

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.

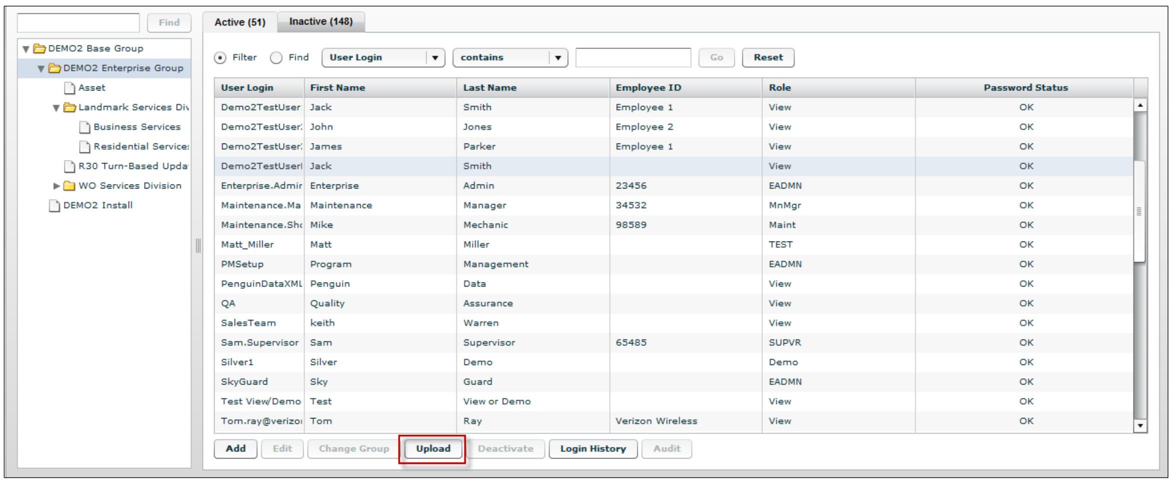


Figure 86: User Bulk Upload Option

2. Click the **Upload** button.

- The Upload Users screen displays.

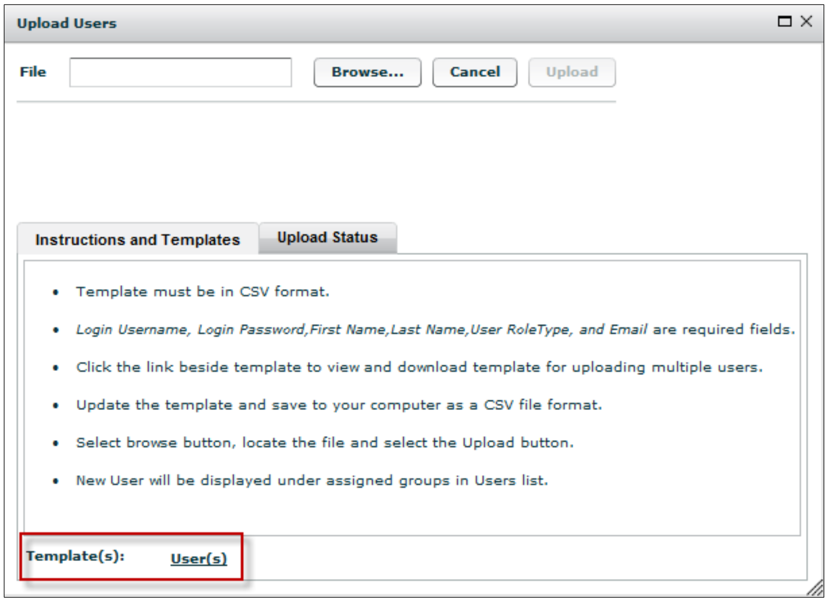
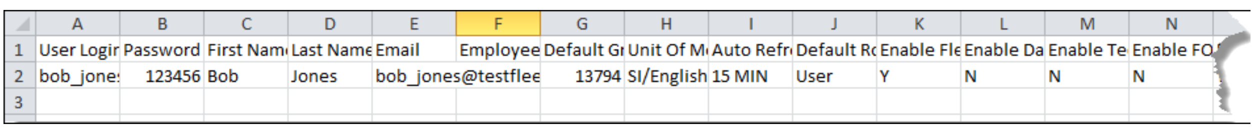


Figure 87: Upload Users Screen

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.



	A	B	C	D	E	F	G	H	I	J	K	L	M	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 FO
2	bob_jone:	123456	Bob	Jones	bob_jones@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.

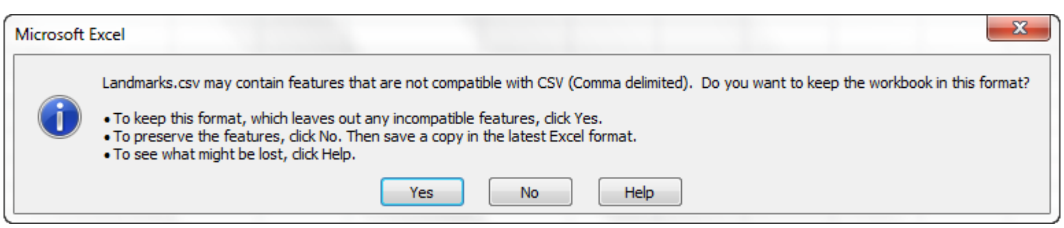


Figure 89: CSV File Format Warning

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.

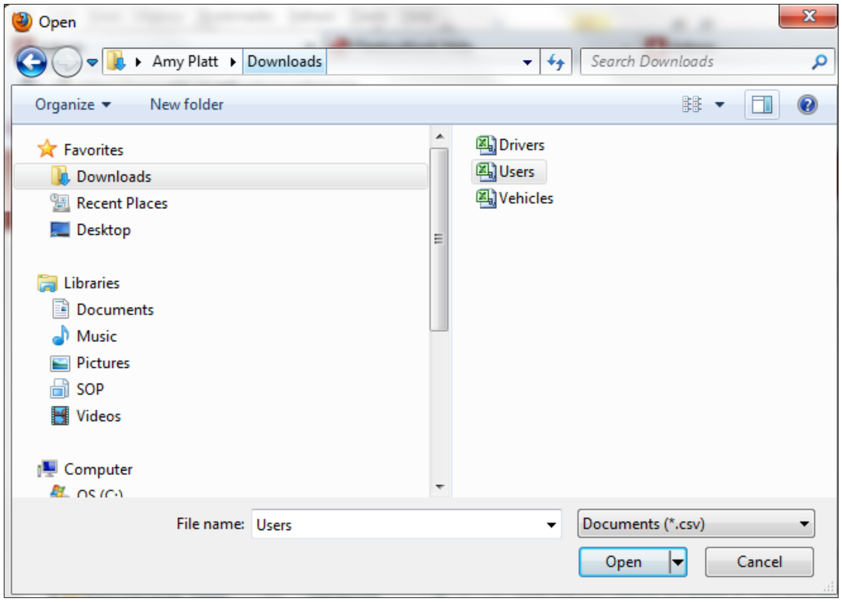


Figure 90: Open User Template

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

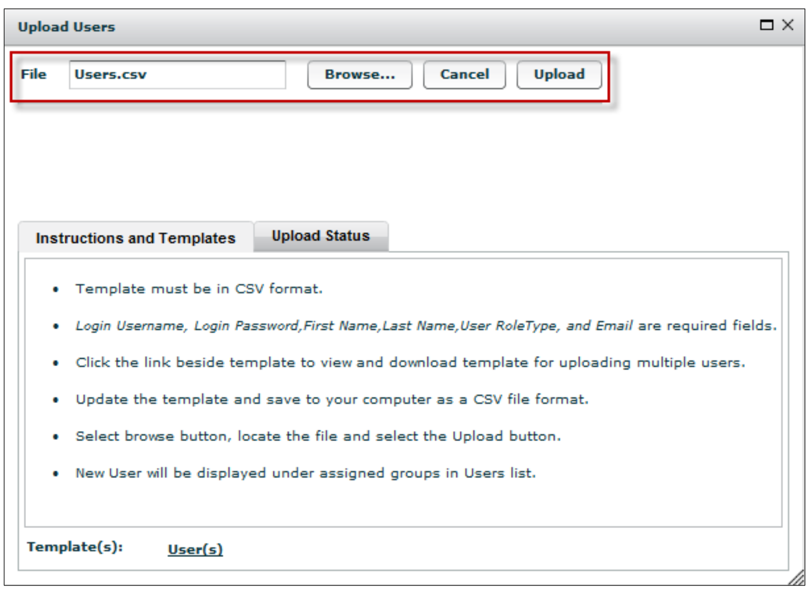


Figure 91: Upload User Template

12. Click the **Upload** button.

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

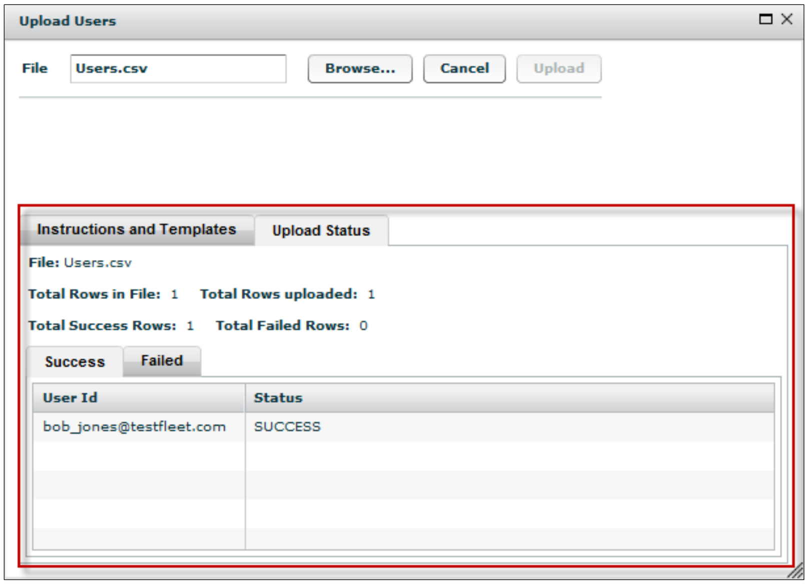


Figure 92: User Upload Status Tab

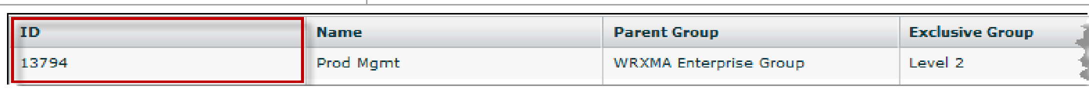
- Each row represents a user. FleetOutlook indicates if the user uploaded successfully or failed. For any users that failed, you will have to fix the errors and re-upload them or create the user manually within FleetOutlook Admin.

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 6-32 characters.
First Name	
Last Name	
Email	Used in combination with the Forgot Password functionality. The temporary password is sent the email address associated with the user.
Employee ID	
Default Group ID	Group ID Number (see Group Admin tab, first column).
	
Unit Of Measurement	SI/English or Metric; Default = Metric
Auto Refresh Rate	Disabled or 5 min, 15 min, 30 min or 60 min; Default = 5 min
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 YN	Y or N; Default = No
Temporary Password YN	Y or N; Default = No

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 non-exclusive groups.

Common uses for groups:

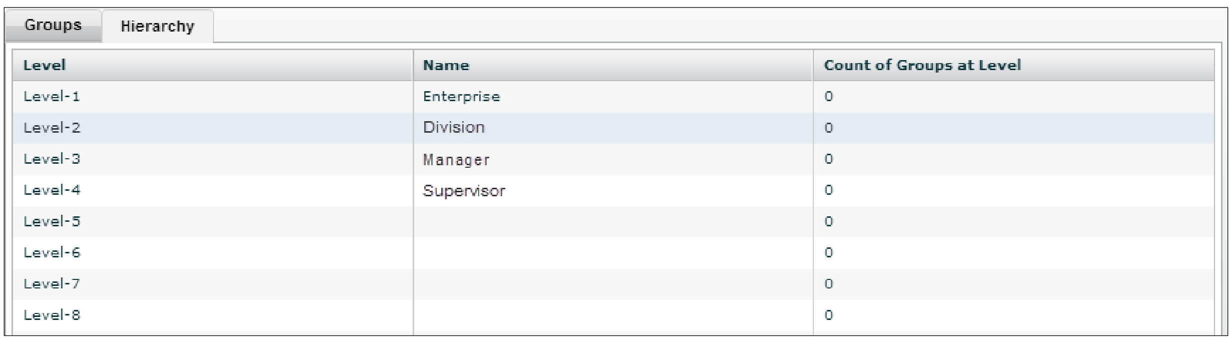
- Assign Users to only the group(s) to which they need access.
- Using the Group Selector option in FleetOutlook, you can filter the data displayed on any tab to a specific group. You cannot filter the Reports tab, as each report contains its own group filter.
- Using groups allows you to analyze group-by-group 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.



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.

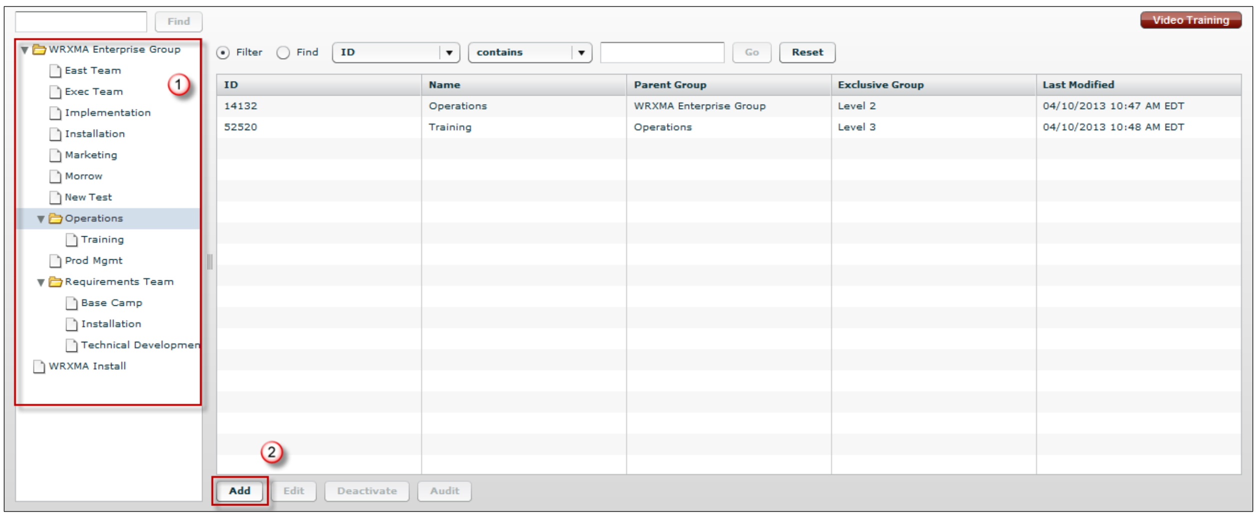


Figure 94: FleetOutlook Groups Screen

3. Click the **Add** button.

- The Add Group screen displays.

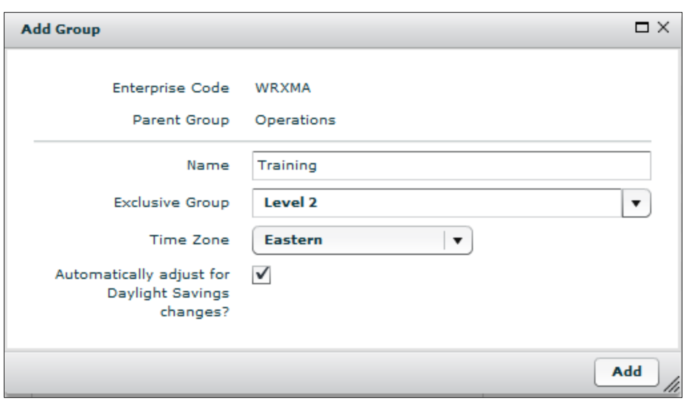


Figure 95: Add Group Screen

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.

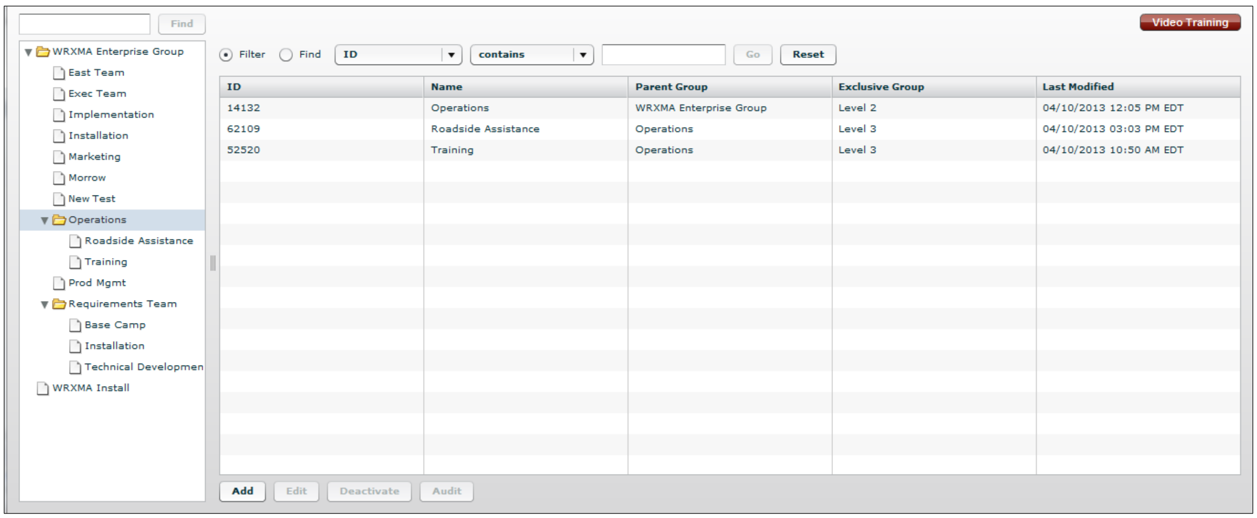


Figure 96: New Group Added - Example

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 location-based 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.

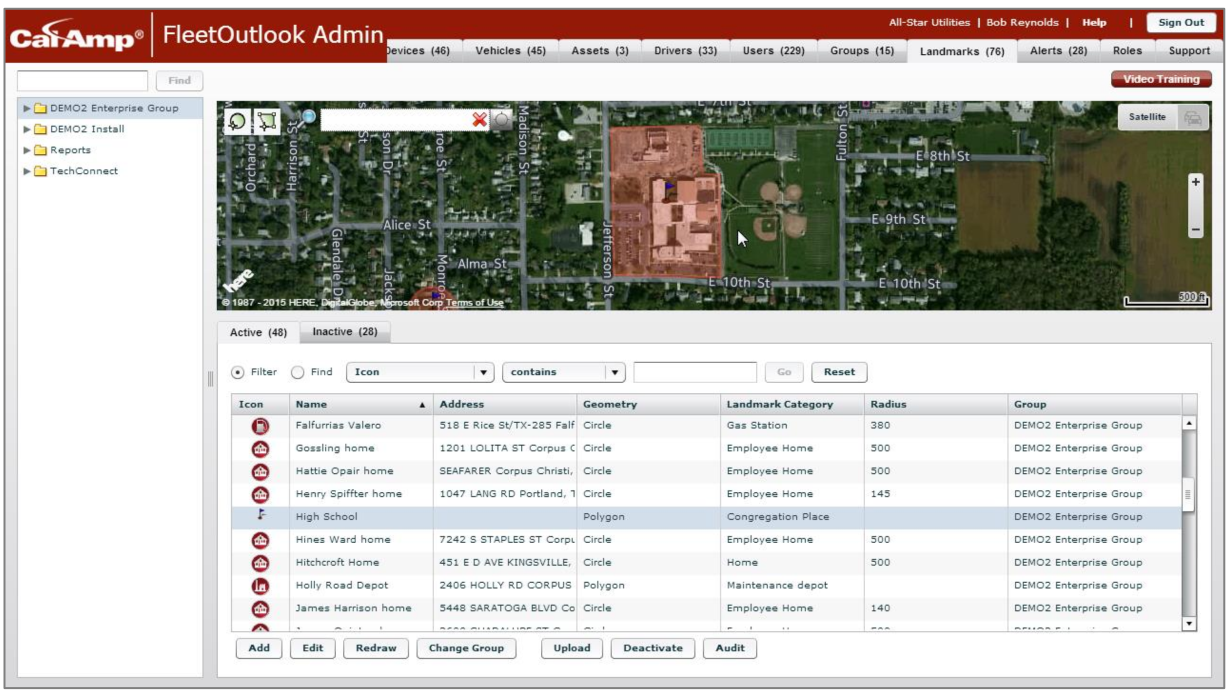


Figure 97: Landmarks Screen

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.

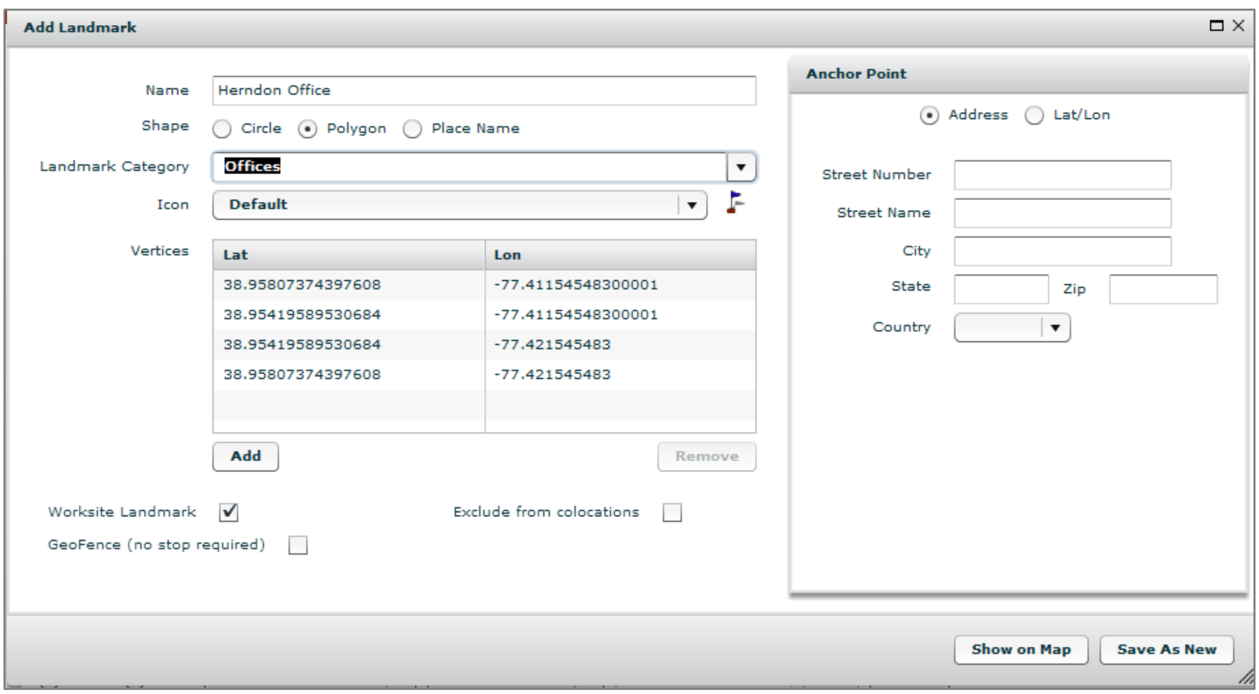


Figure 99: Add Landmark Screen

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

<u>Create a Place Name Landmark:</u>

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.

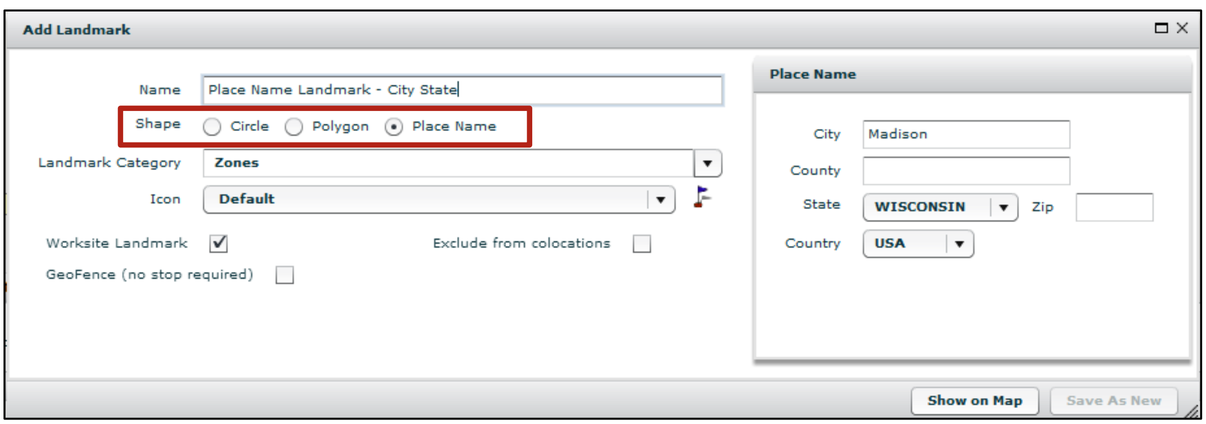


Figure 100: Place Name Landmark Option

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.

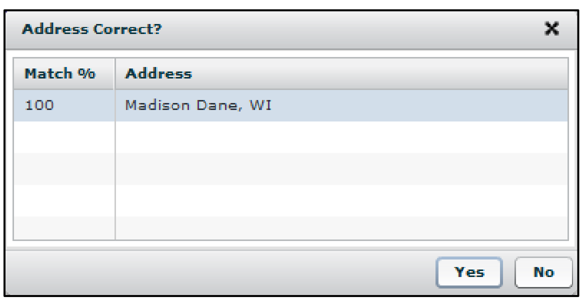


Figure 101: Confirm Place Name Settings

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.

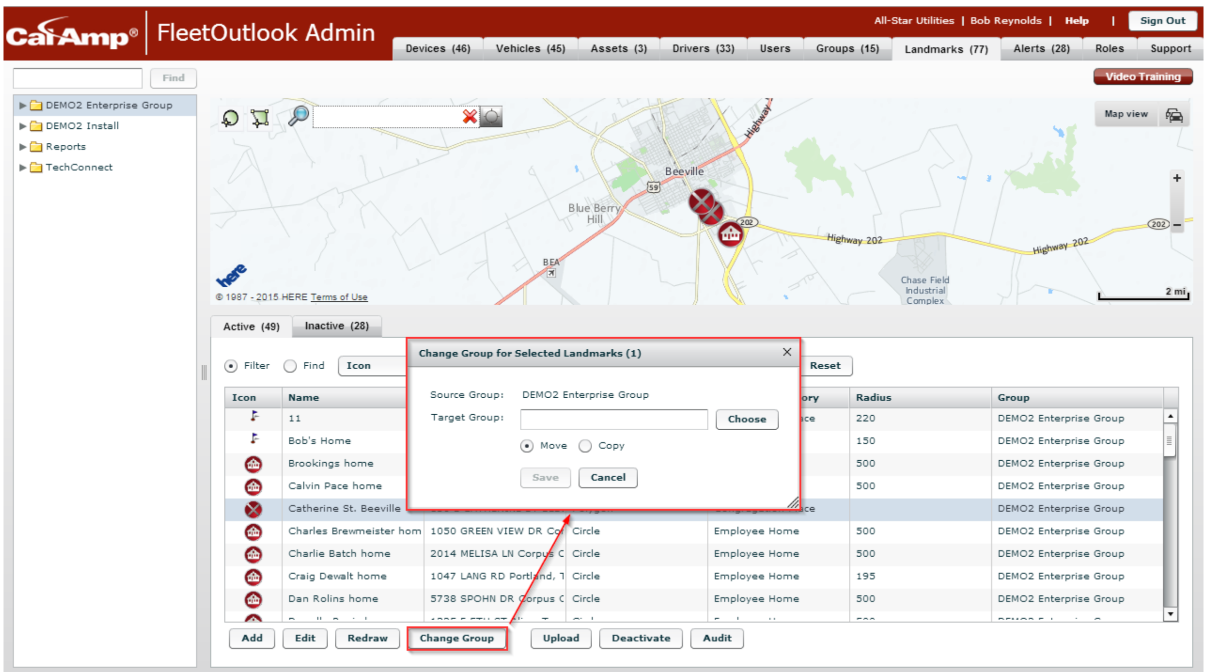


Figure 102: Change Group Option

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.

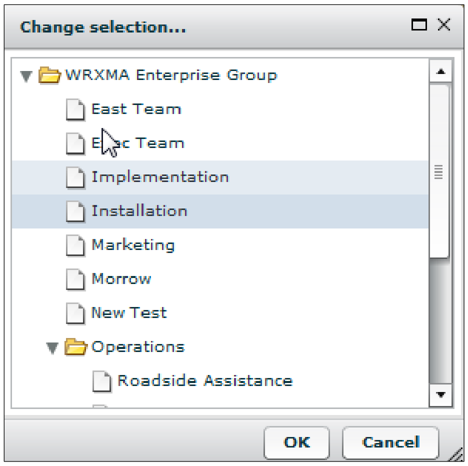


Figure 103: Change Selection Screen

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

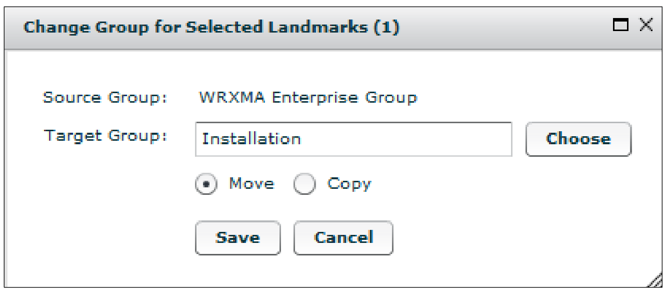


Figure 104: Move or Copy Landmark

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 re-activate 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.

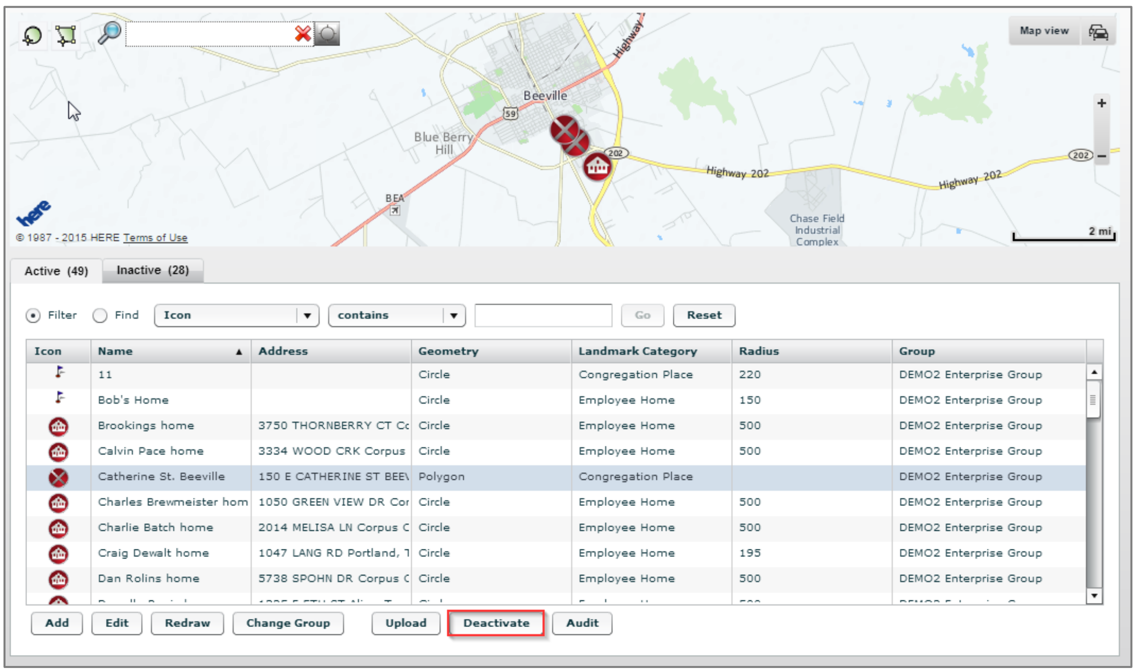


Figure 105: Deactivate Landmark Option

2. Click the **Deactivate** button.

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.

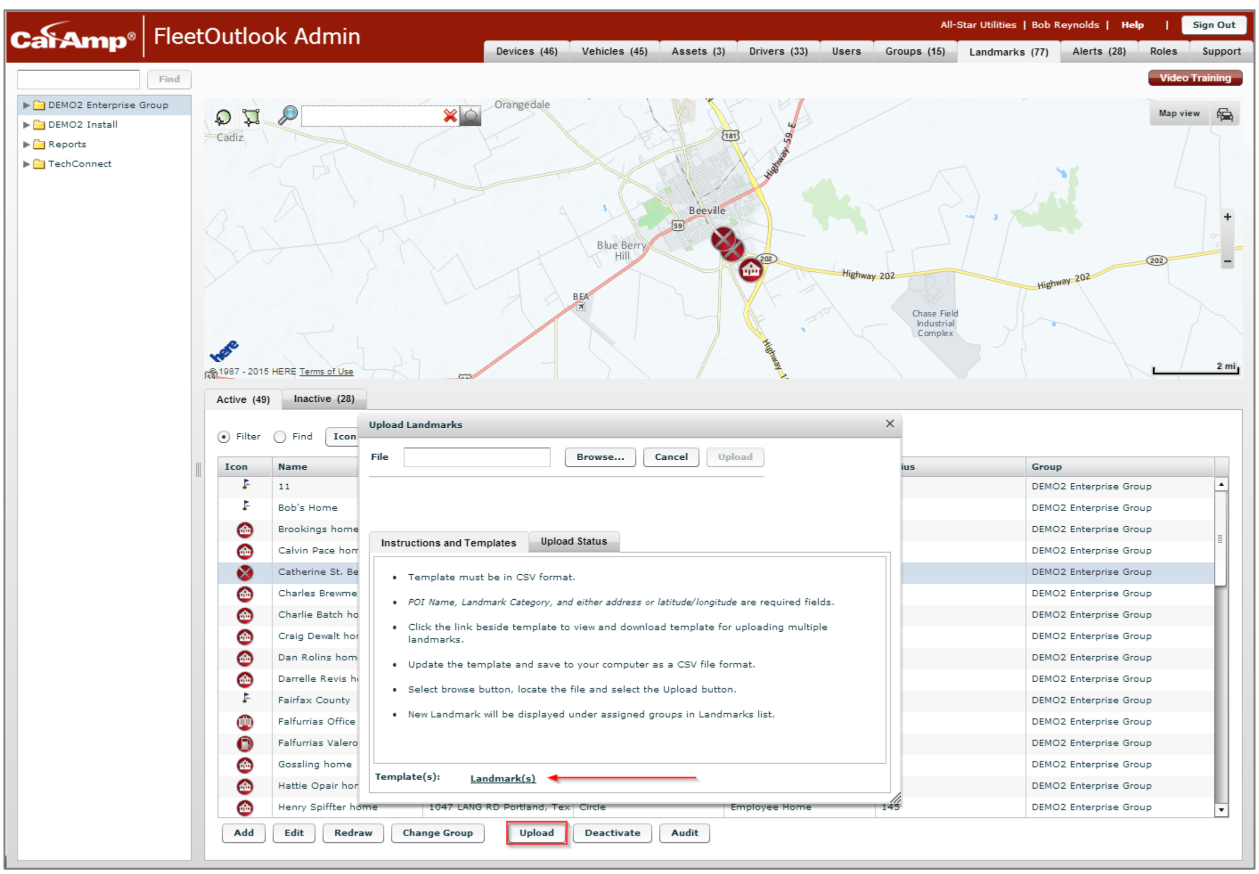


Figure 107: Landmark Bulk Upload

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.

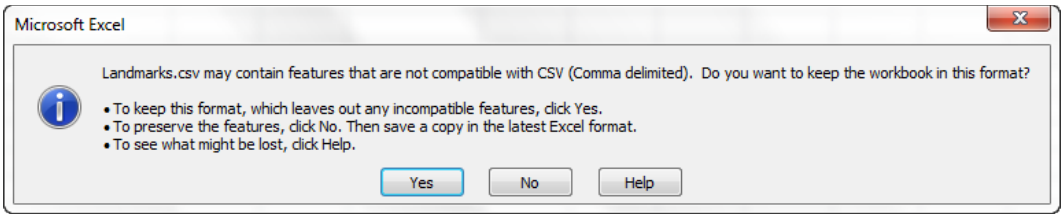


Figure 108: Excel Warning

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.

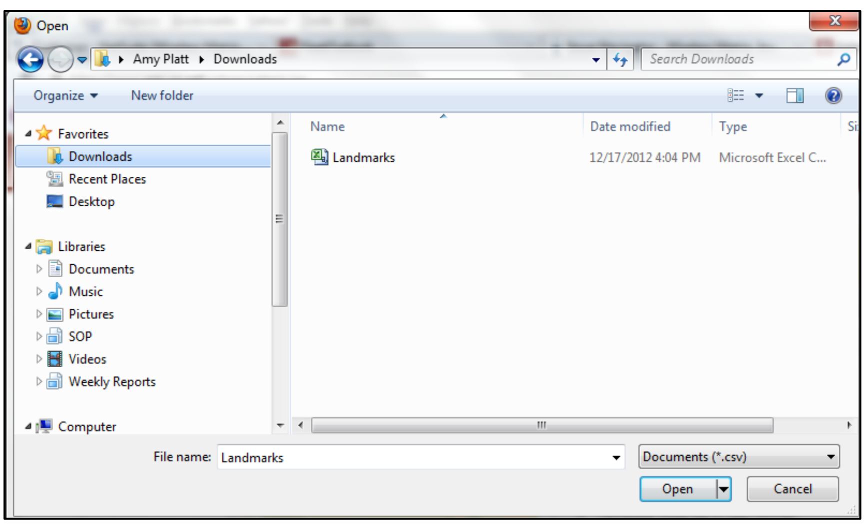


Figure 109: Open Saved Landmark File

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

- FleetOutlook automatically populates the File field with the template name.

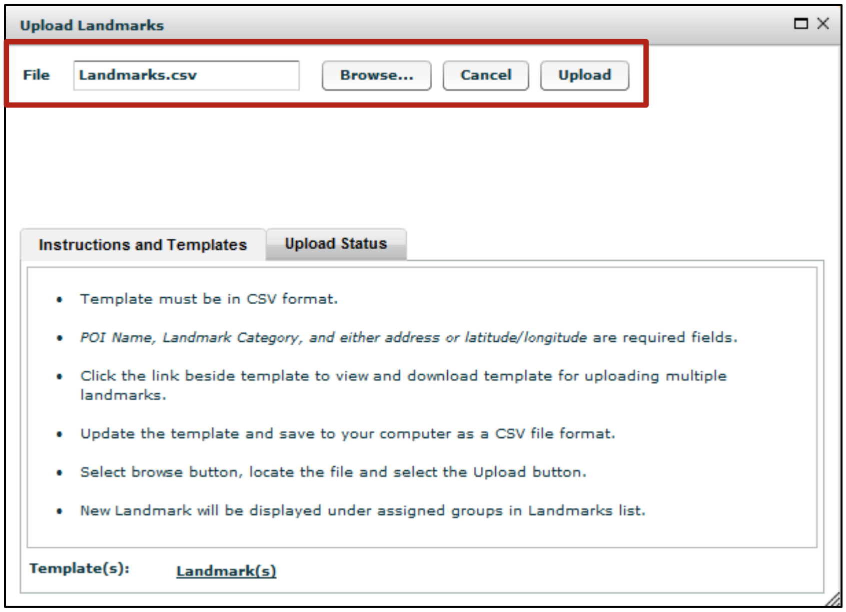


Figure 110: Upload Landmarks Screen

12. Click the **Upload** button.

- FleetOutlook uploads the landmarks and displays the Upload Status tab.

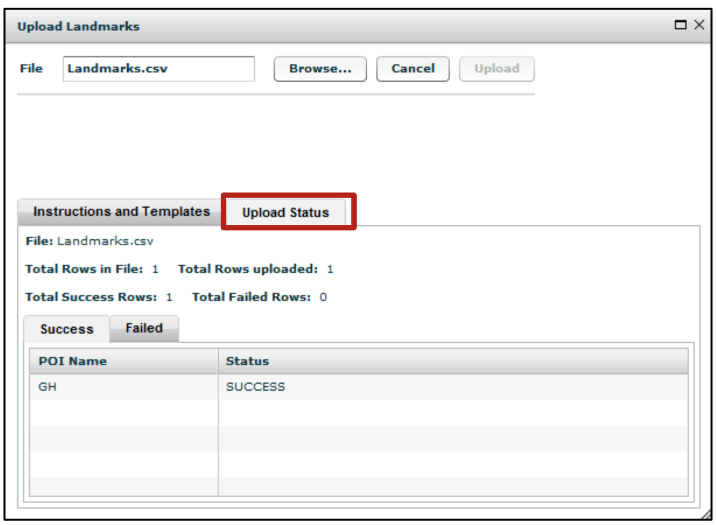


Figure 111: Upload Status

- 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.

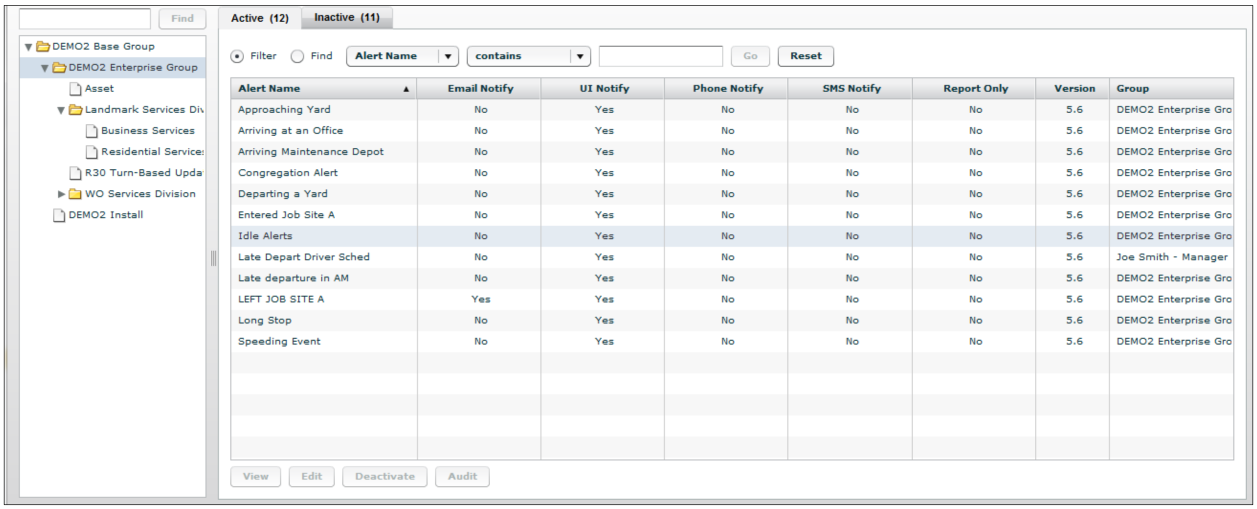


Figure 112: Alerts Screen

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.

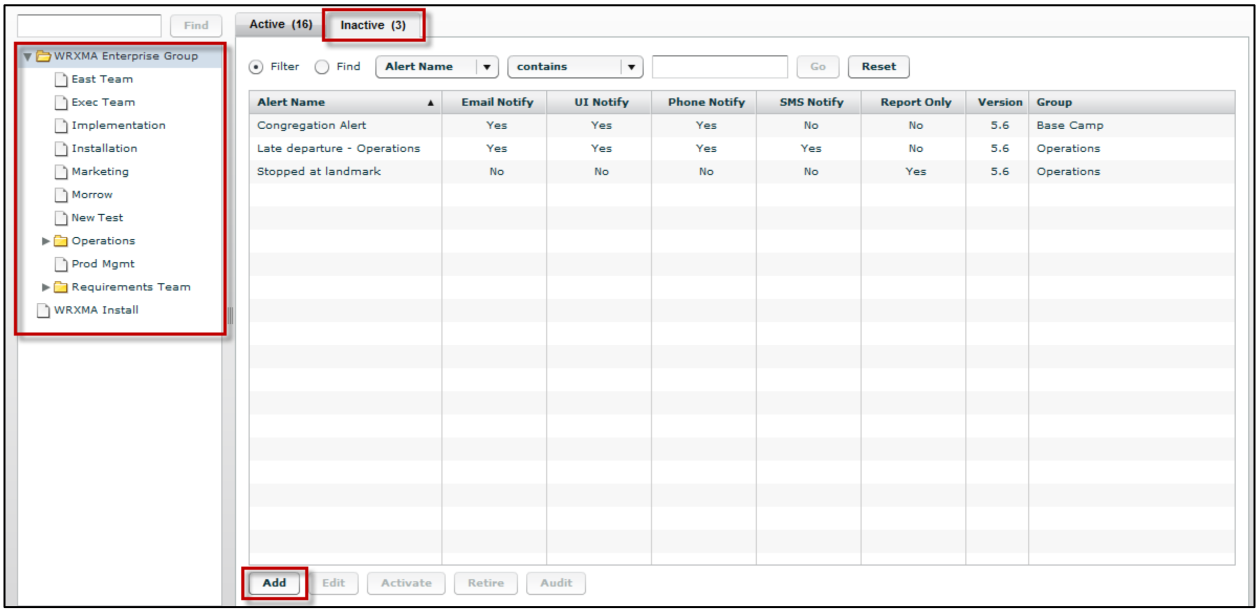


Figure 113: Add an Alert from Inactive Tab

2. Click the **Add** button.

- The Add Alert screen displays.

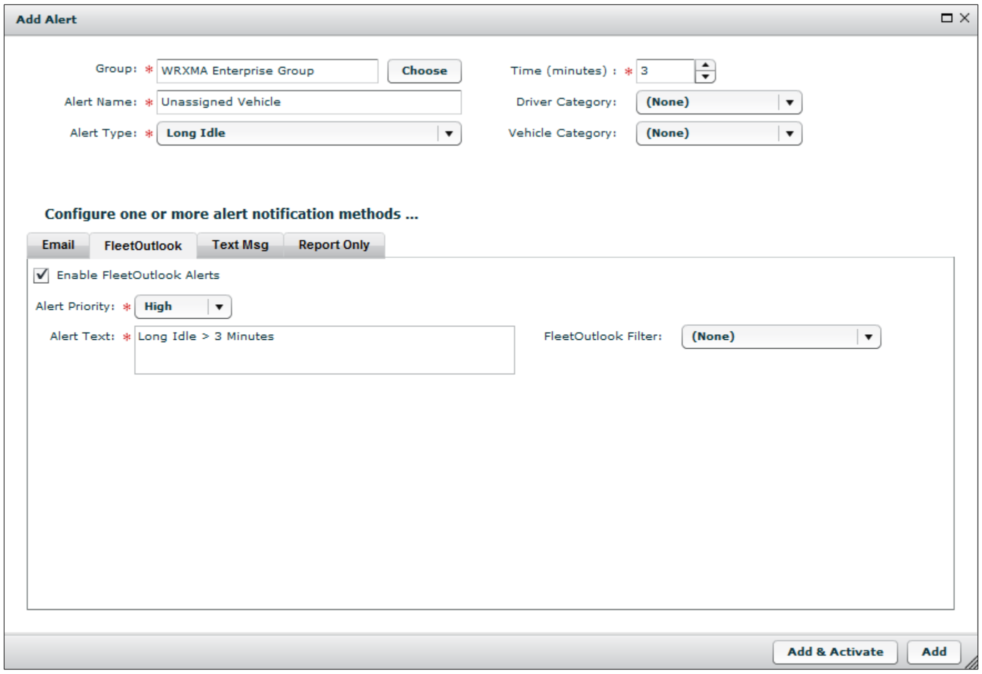


Figure 114: Add Alert Screen

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.

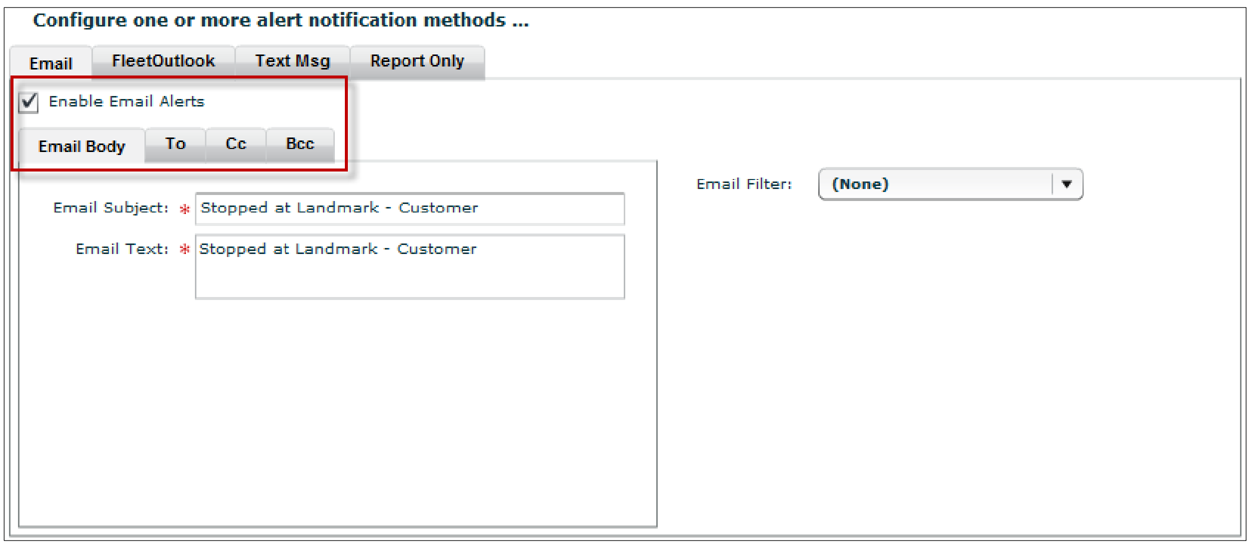


Figure 115: Email Message Alert Notification Options

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 twenty-four hours.

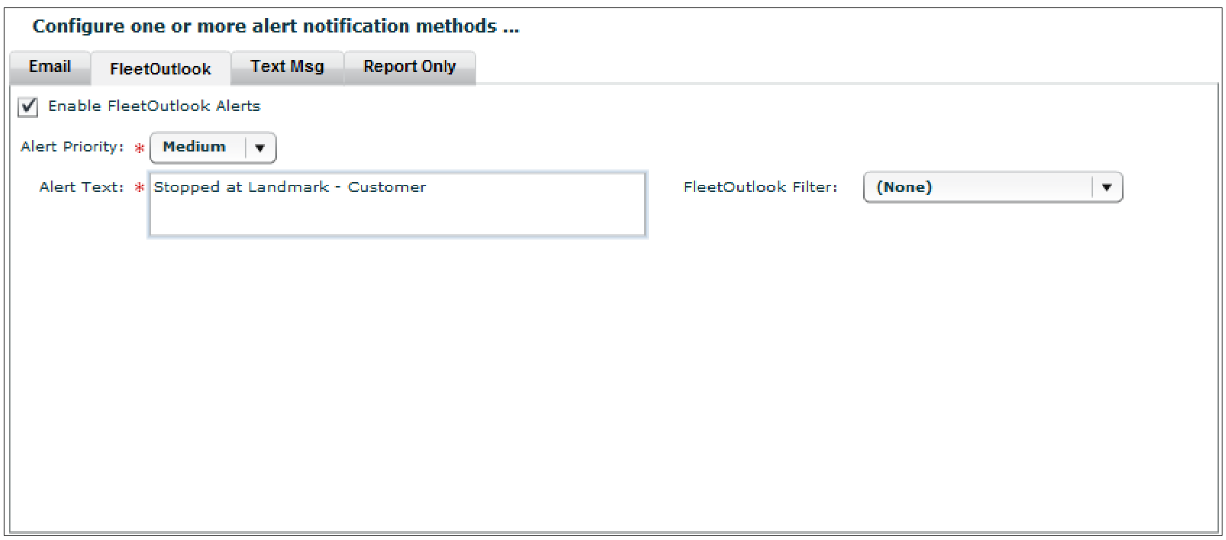


Figure 116: FleetOutlook Alert Notification Options

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.

<u>Note:</u> 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

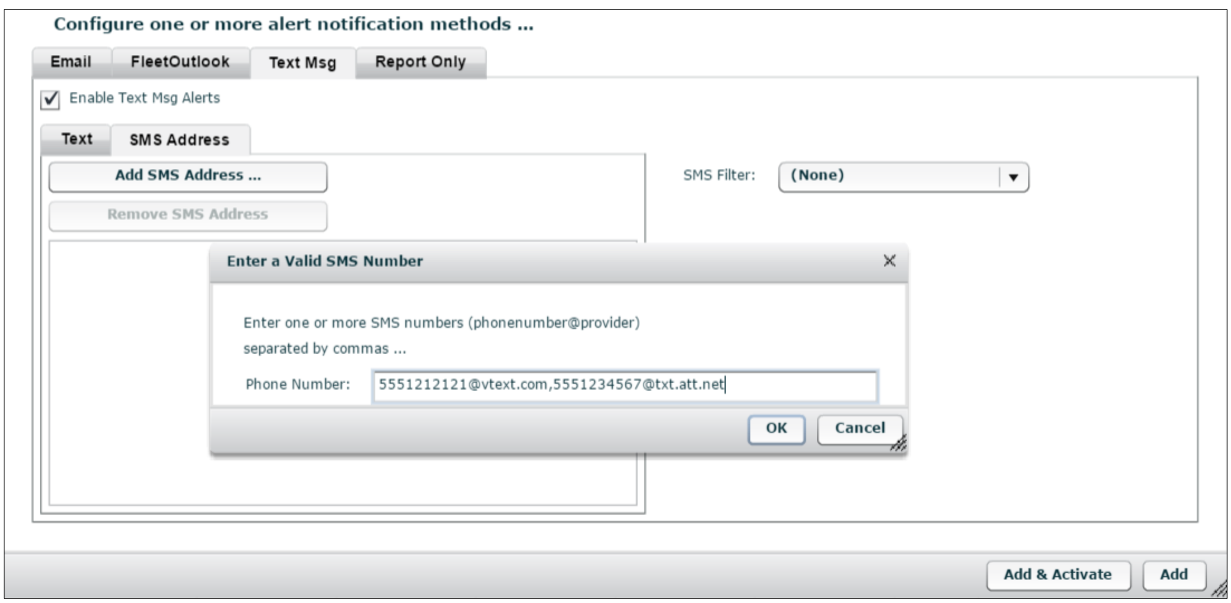


Figure 117: Text Message Alert Notification

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.

<u>Note:</u> 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.

<u>To Set a FleetOutlook Alert Notification Filter:</u>

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

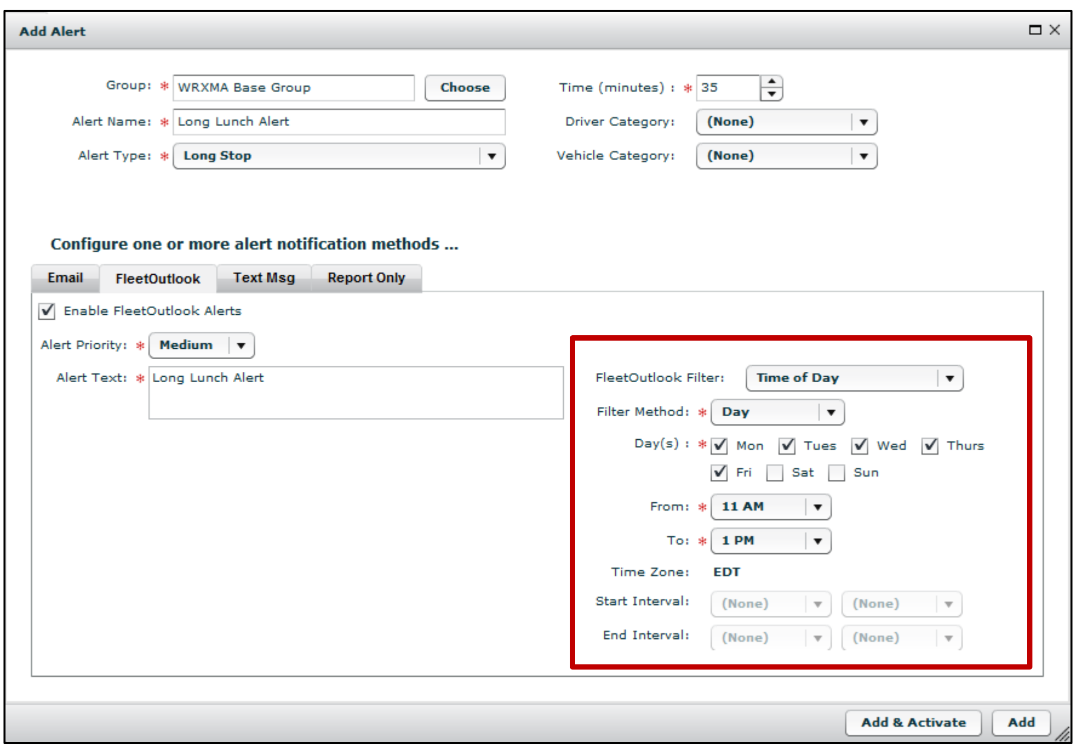


Figure 118: Alert Notification Filter

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 <u>on</u> 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.

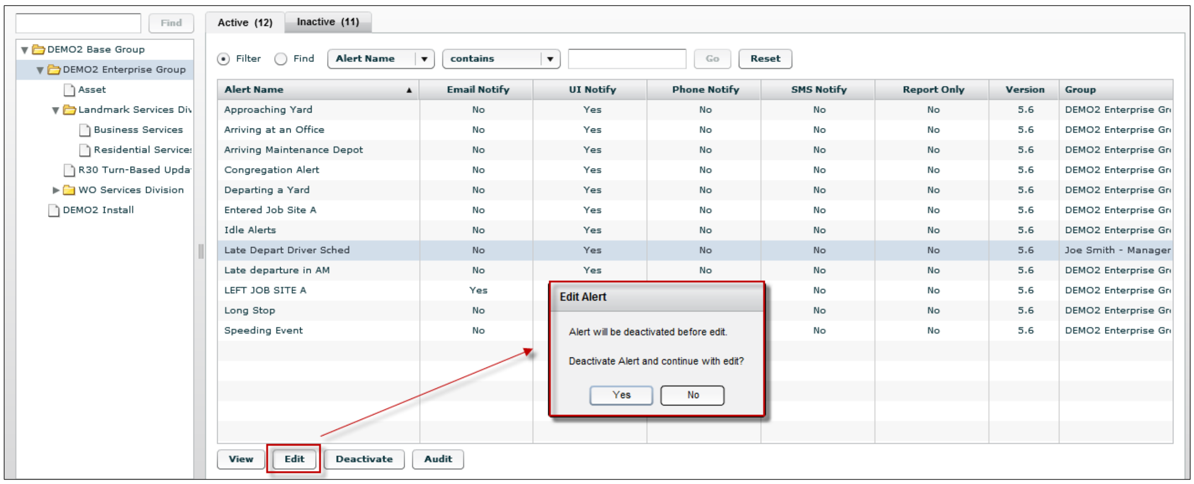


Figure 119: Deactivate an Alert to Edit

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.

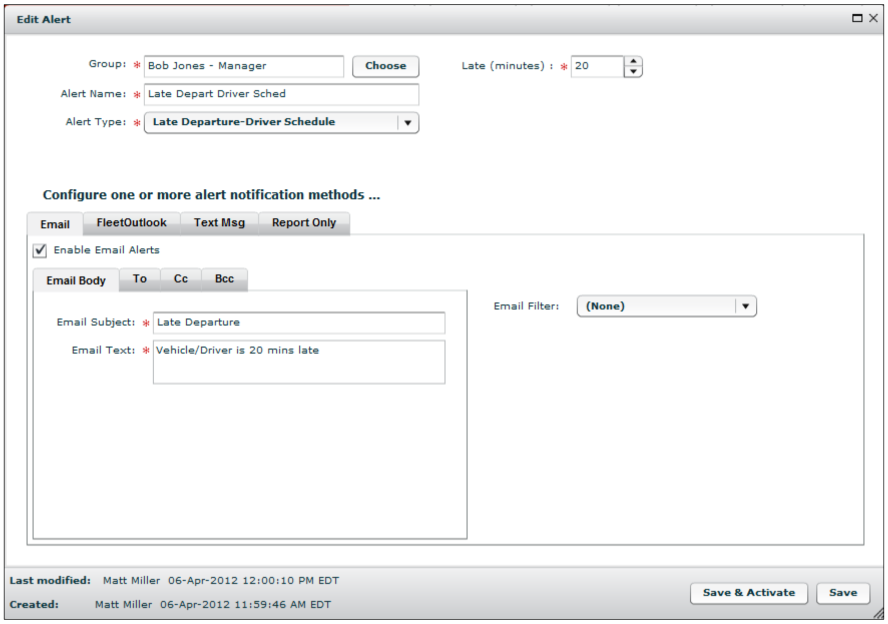


Figure 120: Edit Alert Screen

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.

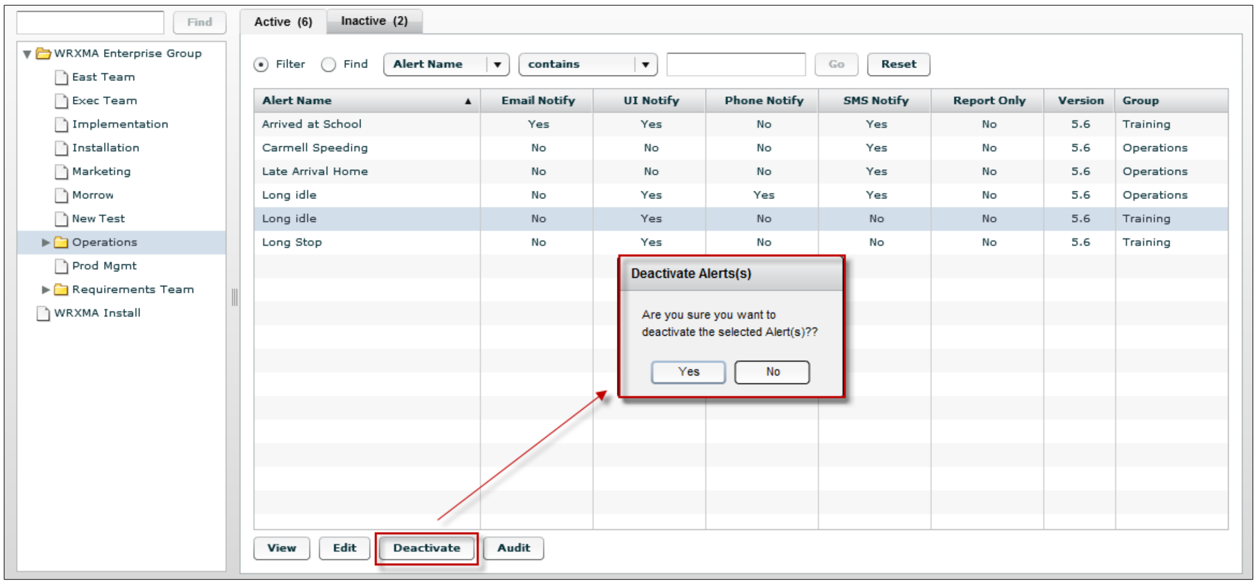


Figure 121: Deactivate an Alert

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.

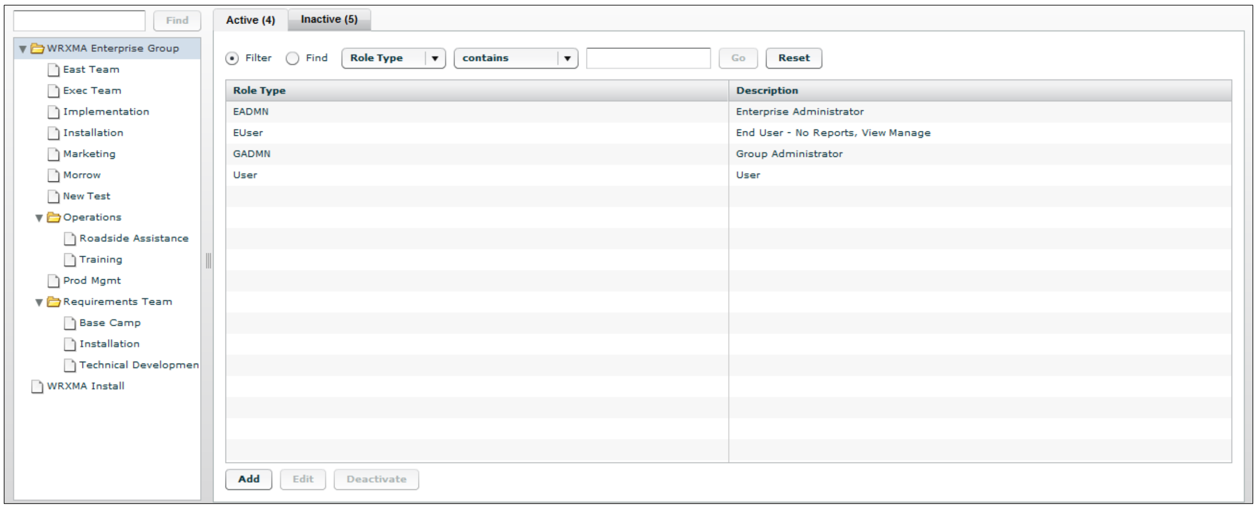


Figure 122: Roles Screen

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.

<u>To Add a Role:</u>

1. Select the **Roles** tab, and then click the **Add** button.

- The Create Role screen displays.

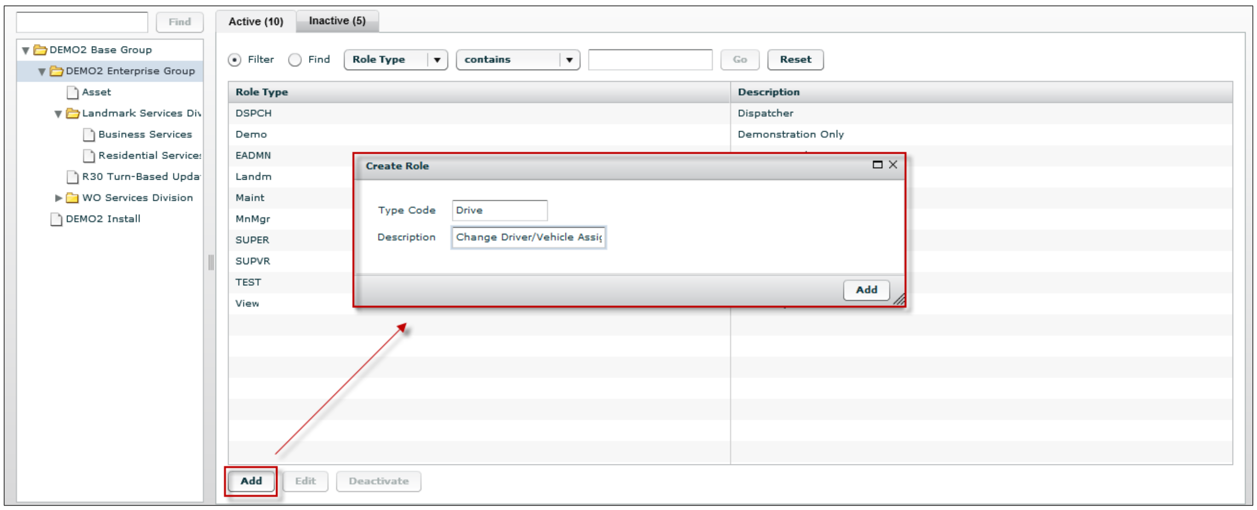


Figure 123: Create Role

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.

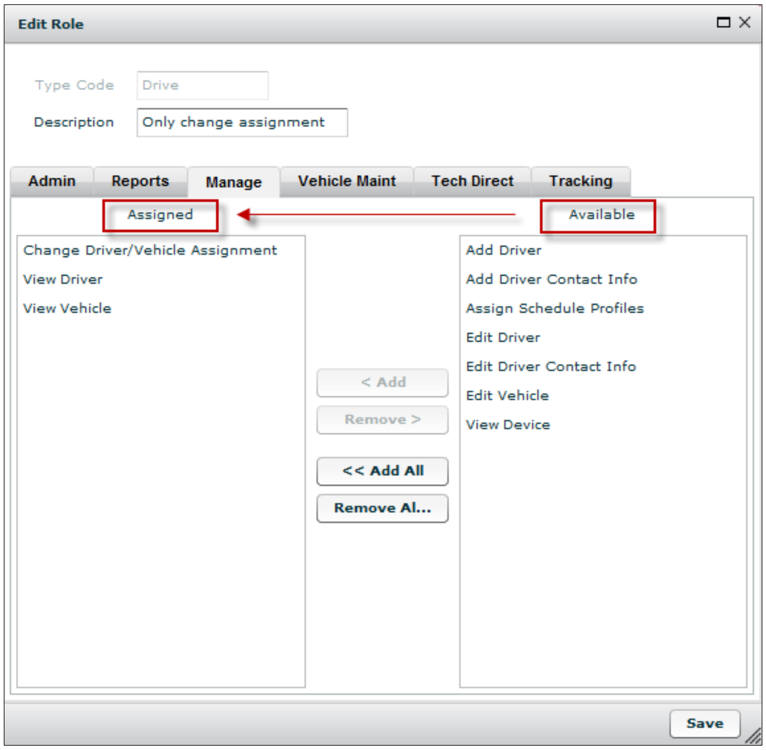


Figure 124: Edit Roles Screen

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.

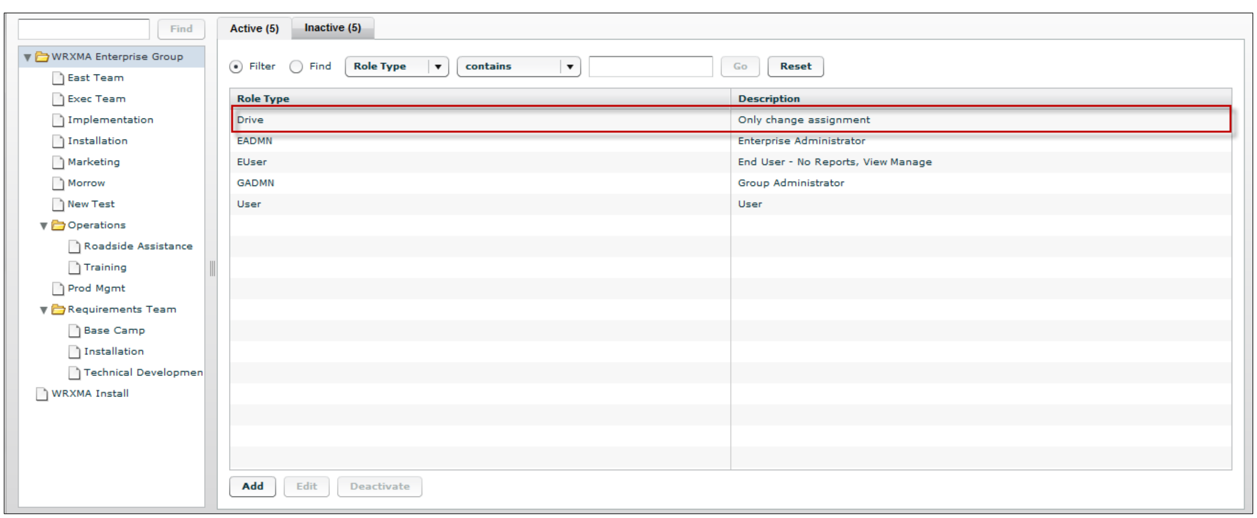


Figure 125: New Role Listed

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.

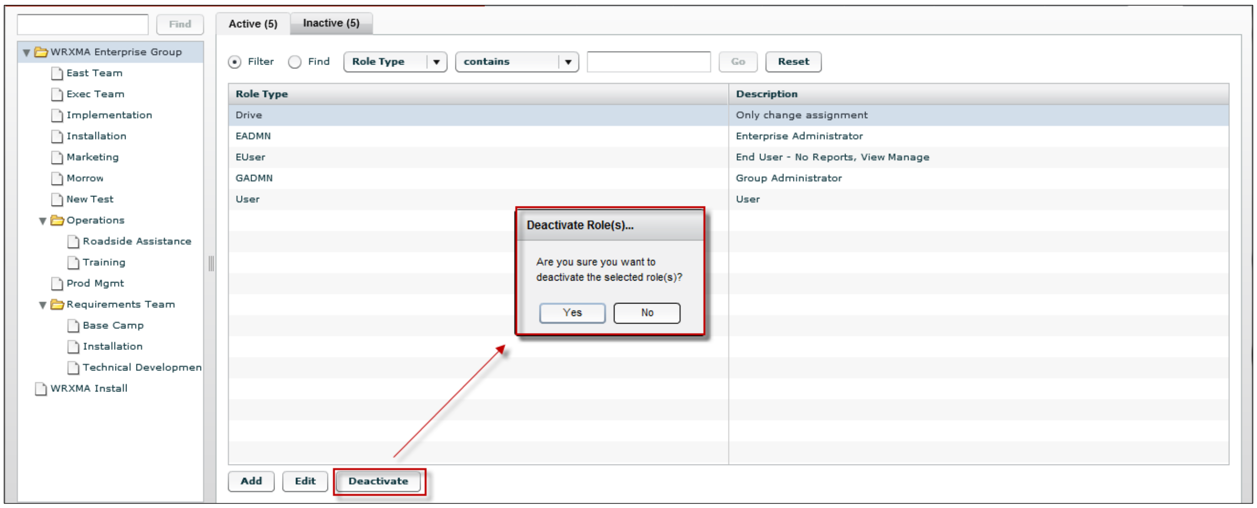


Figure 126: Deactivate a Role

3. Click the **Yes** button to confirm deactivation.

15 SUPPORT TAB

The Support Tab has several customizable user settings. The Support tab contains two sub-tabs: 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.

Figure 127: User Options Tab

15.2 ABOUT FLEETOUTLOOK ADMIN

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

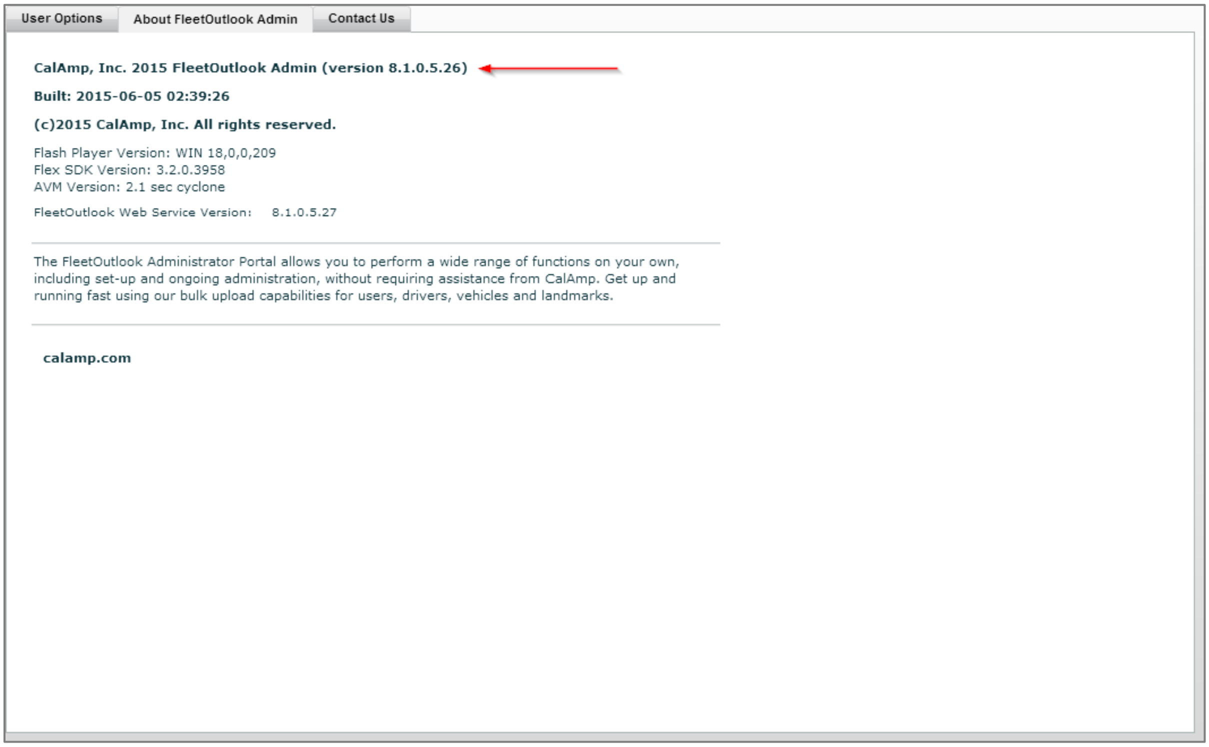


Figure 128: About FleetOutlook Tab