



# FleetOutlook<sup>®</sup> TechDirect User Guide

---

Updated 10/2013

## CalAmp | FleetOutlook TechDirect User Guide

*Copyright © 2013 CalAmp Corporation. All rights reserved.*

Printed in the United States of America.

All trademarks used are properties of their respective owners.

This document is proprietary to CalAmp Corporation. Do not reproduce, use or disclose without permission.

We have made every effort to ensure the accuracy of all information contained in this document. However, CalAmp Corporation makes no expressed or implied warranty or representation based upon the enclosed information.

Revision History:			
Version #	Revision Date	Author	Details
1.0	03/15/2010	Fenley	Incorporated operational information and overview sections.
2.0	04/2013	ABP	Complete revision to mirror current TechDirect functionality.
2.1	10/2013	ABP	Updated for 7.6 release

## TABLE OF CONTENTS

<b>1</b>	<b>INTRODUCTION TO FLEETOUTLOOK &amp; TECHDIRECT .....</b>	<b>1</b>
1.1	SYSTEM REQUIREMENTS .....	1
1.2	USER NAME, PASSWORD AND SECURITY .....	1
<b>2</b>	<b>TECHDIRECT OVERVIEW .....</b>	<b>2</b>
2.1	MAP .....	3
2.2	GANTT CHART .....	4
2.2.1	Gantt Chart Bar Color Status .....	5
2.2.2	Gantt Chart Views .....	6
2.2.3	Navigate Driver List .....	7
2.2.4	Search for a Driver .....	7
2.2.5	Filter the Driver List .....	8
2.2.6	Change Date Selection .....	9
2.2.7	Adjust Time Display .....	9
<b>3</b>	<b>WORK ORDERS .....</b>	<b>10</b>
3.1	WORK ORDER RADIUS BY ZIP CODE .....	10
3.2	WORK ORDER TYPES .....	11
3.3	VIEW A WORK ORDER .....	11
3.4	ADD A WORK ORDER .....	12
3.5	EDIT A WORK ORDER .....	13
3.6	REASSIGN A WORK ORDER .....	14
3.7	CANCEL A WORK ORDER .....	15
3.8	WORK ORDER BULK UPLOAD .....	16
3.8.1	Work Order Template Columns .....	18
3.9	VIEWING WORK ORDERS IN THE BREADCRUMB DETAIL .....	19
3.10	VIEWING WORK ORDERS IN TECHCONNECT .....	20
<b>4</b>	<b>WORK ORDER REPORTING .....</b>	<b>21</b>

## LIST OF FIGURES

Figure 1: TechDirect Screen .....	2
Figure 2: TechDirect Map.....	3
Figure 3: TechDirect Gantt Chart .....	4
Figure 4: Gantt Chart - Workload View.....	6
Figure 5: Gantt Chart - Schedule View.....	6
Figure 6: Driver List - Navigation Options.....	7
Figure 7: Search for a Driver .....	7
Figure 8: Filter Driver List.....	8
Figure 9: Date Selection Options .....	9
Figure 10: Time Display - Hourly.....	9
Figure 11: Time Display - 15-Minute Intervals .....	9
Figure 12: Time Display - One-Minute Intervals .....	9
Figure 13: Adjustable Radius by ZIP Code.....	10
Figure 14: Adjustable Duration by Work Order Type .....	11
Figure 15: View a Work Order.....	11
Figure 16: New Work Order Screen .....	12
Figure 18: Edit Work Order Screen.....	13
Figure 19: Reassign Driver Using Edit Work Order Screen .....	14
Figure 20: Reassign Work Order Using Drag-and-Drop Operation.....	14
Figure 21: Cancel a Work Order .....	15
Figure 22: TechDirect Bulk Upload Screen .....	16
Figure 23: Sample Work Order Template.....	16
Figure 24: Excel Warning Message.....	17
Figure 25: Bulk Upload Review Screen.....	17
Figure 26: Work Orders on the BreadCrumb Detail Map .....	19
Figure 27: Work Order Displayed in TechConnect .....	20
Figure 28: Work Order Report Example .....	21

# 1 INTRODUCTION TO FLEETOUTLOOK & TECHDIRECT

---

FleetOutlook is a web-based fleet tracking application that allows the user to see where drivers and vehicles are, and to capture/report on various aspects of driver and vehicle operations. Because it is web-based, you can use it from any computer that is connected to the Internet and supports the system requirements.

This guide provides the basic navigation and operating instructions for using the TechDirect module within FleetOutlook. Depending on your FleetOutlook user profile, you may not have the appropriate permissions to access all of the TechDirect features highlighted in this guide.

To download the comprehensive FleetOutlook User Guide and FleetOutlook Admin User Guide, click the Help button within FleetOutlook.

## 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.wirelessmatrix.com/resource/docs/Browser\\_req.pdf](http://www.wirelessmatrix.com/resource/docs/Browser_req.pdf)

## 1.2 USER NAME, PASSWORD AND SECURITY

A user name and password are required to log into and use FleetOutlook. If you do not have login credentials, please contact your company'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 immediately 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 otherwise comply with this section.

## 2 TECHDIRECT OVERVIEW

TechDirect an easy-to-use tool within FleetOutlook that provides work order visualization and driver locations throughout the day.

Two methods of work order input:

**Open Partner Interface (OPI)** – TechDirect adds value to your traditional workforce management system solution by overlaying key work data from your workforce management application with real-time vehicle location intelligence on a single FleetOutlook map.

**On-Screen Input** – TechDirect provides a basic workforce management system solution with real-time vehicle location intelligence our customers not integrating with a traditional workforce management system. This option enables you to input and edit work orders directly in FleetOutlook without using OPI integration.

The TechDirect screen has two main components:

1. Map – Always displayed in the top pane. The map shows driver locations and work orders. Work orders are color-coded to indicate job status.
2. Gantt chart – Always displayed in the bottom pane. The Gantt chart displays the work orders assigned to each driver, actual workload and job status.

Select a single driver on the Gantt chart and the map centers to the driver's last reported location on the map and displays assigned work orders for the current day.

Select a work order on the Gantt chart or directly on the map and the map centers to the work order location and the Work Order screen is displayed.

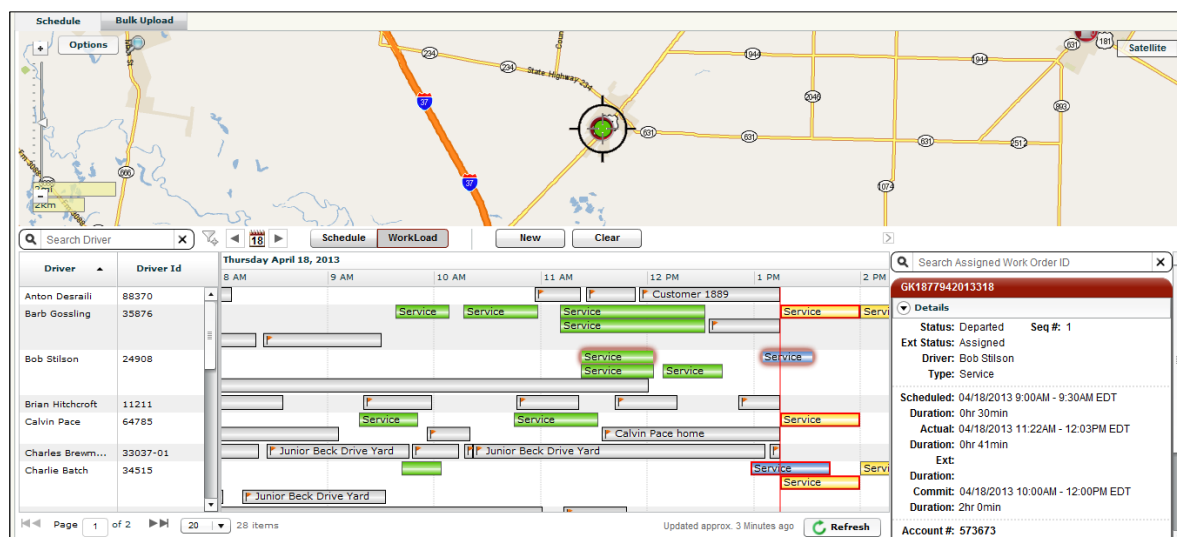


Figure 1: TechDirect Screen

## 2.1 MAP

The TechDirect has the same functionality as the Tracking maps, unlimited panning and zooming, search and center capability by address or vehicle and toggle on and off Satellite view. The Options button, located in the upper-left corner of the map, enables you to toggle on or off the display of vehicles and work orders.

**Note:** Refer to the FleetOutlook User Guide for detailed instructions on how to use FleetOutlook map functions and features.

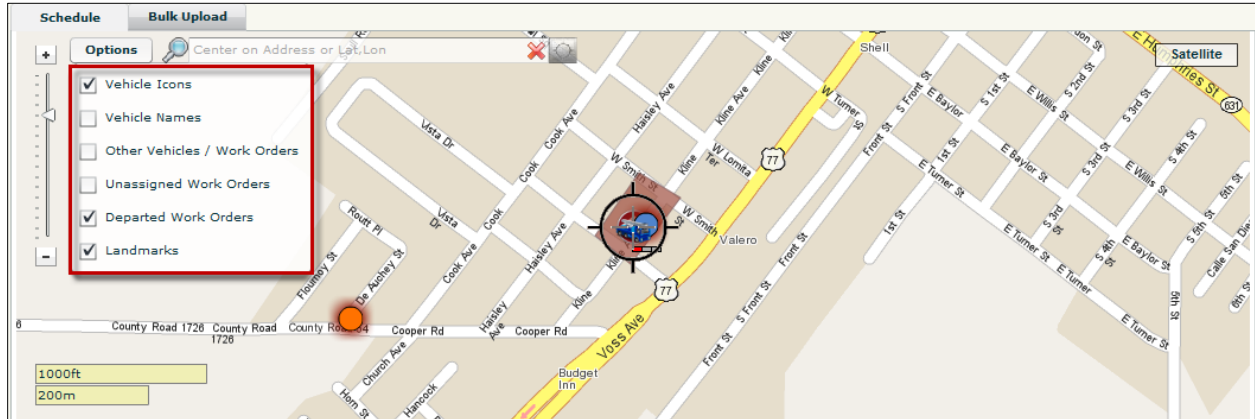


Figure 2: TechDirect Map

## 2.2 GANTT CHART

The Gantt chart shows the drivers in a selected group or your entire fleet and their assigned work orders for the current day. The Gantt chart only displays drivers who have work orders assigned. FleetOutlook defines an active driver as a driver who has driven more than one mile.

Work orders are displayed as bars on the Gantt chart. The length of each bar is dependent on schedule duration. The bar color indicates the job status. The bar colors change as the job status changes.

- Rest your mouse over any bar and a Work Order Tool Tip displays basic information about the work order.
- Select any bar on the Gantt chart and the Work Order screen is displayed to the left. Click the Collapse/Expand button above the Work Order screen to collapse or expand the Work Order screen.

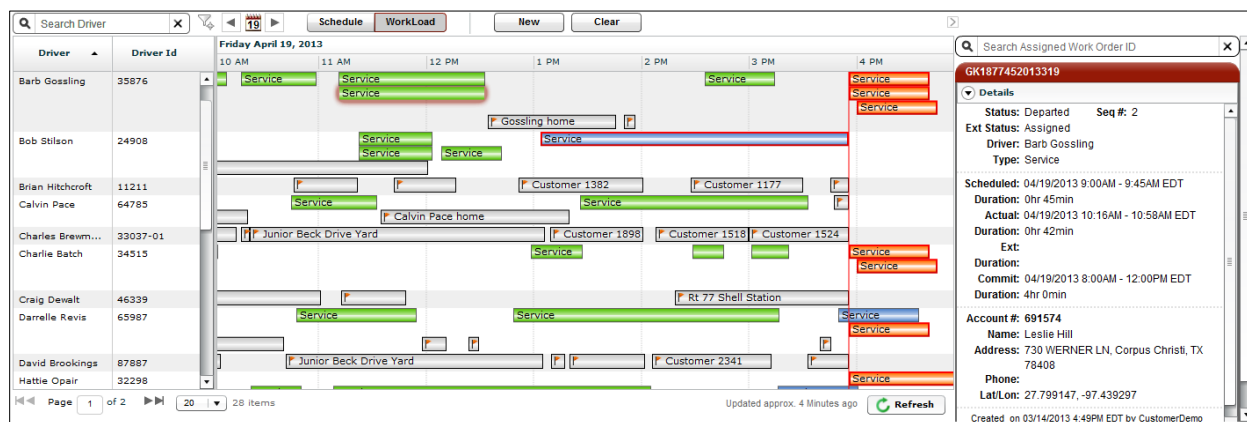


Figure 3: TechDirect Gantt Chart



### 2.2.1 GANTT CHART BAR COLOR STATUS

The following table outlines the color codes for the work order bars on the Gantt chart.

		External - WFMS or Driver-Indicated Status	
		Incomplete Assigned – No Arrival Indicated by Driver	Departed Job Completed – Indicated by Driver
FleetOutlook (GPS-Based ) Status	<b>Incomplete</b> Assigned to a Driver, but No GPS-Based Arrival Status	<div></div> <div>Scheduled Start Passed</div> <div>Commit in Jeopardy (15 min)</div> <div>Commit Passed</div>	<div></div> <div>Commit Passed</div>
	<b>Arrived</b> GPS-Based Arrival Status, but no Departure Status	<div></div>	<div></div>
	<b>Departed</b> GPS-Based Arrival Status and Departure Status	<div></div>	<div></div>
	<b>Unassigned</b> Work Order Not Assigned to a Driver	<div></div>	
	<b>Landmark</b> Indicates Time Spent Worksite Landmark	<div>🚩 Landmark Name</div>	
<p><b>Note:</b> If a Work Order is edited and <u>any of the following fields</u> are modified, any existing reported GPS-based Arrival and Departure Status indications are cleared:</p> <div>Location</div> <div>Driver</div> <div>Scheduled Start Time*</div> <p>*If the Scheduled Start Time is modified, but calendar date for the Work Order does not change, the reported GPS-based Arrival or Departure status is not cleared.</p>			

## 2.2.2 GANTT CHART VIEWS

The Gantt chart has two available views to help fleet managers and fleet dispatchers manage work orders throughout the workday. By default, the Workload view is displayed.

**Workload View** – This view shows the planned work to the right of the current time line and the actual work done to the left of the time line. This view enables you to monitor the workload for each driver as the day progresses.

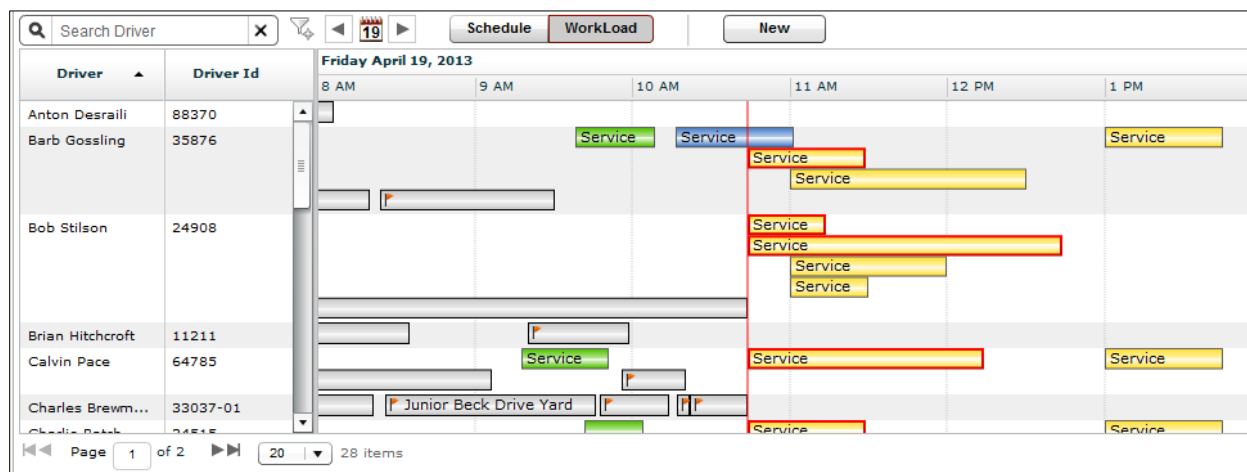


Figure 4: Gantt Chart - Workload View

**Schedule View** – This view shows the planned work orders for each driver for each day. The vertical red line indicates the current time. As drivers manage their day, use the Workload View to see work orders in jeopardy of passing their commit window or have passed their commit window.

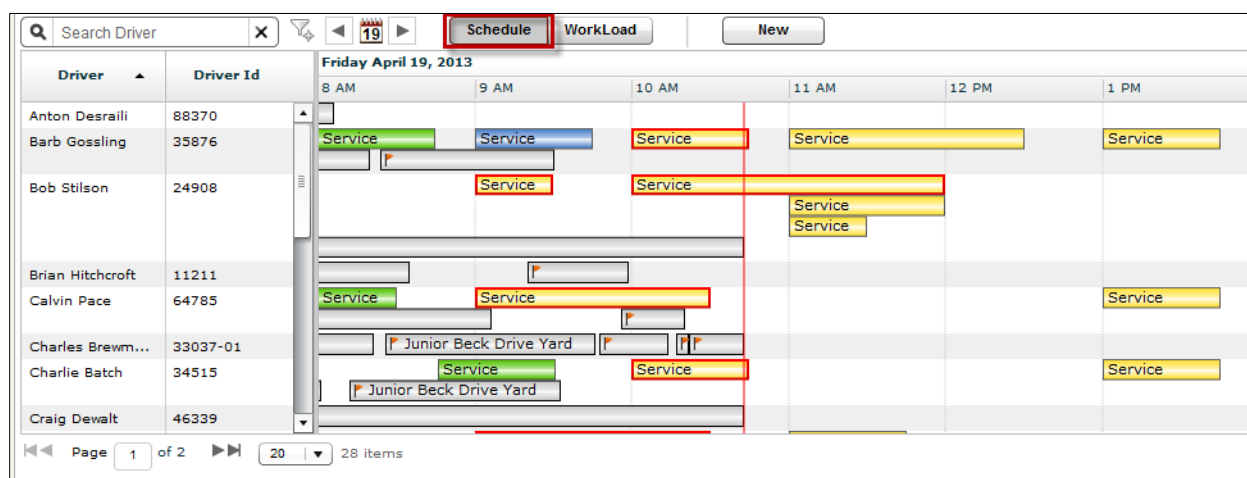


Figure 5: Gantt Chart - Schedule View

### 2.2.3 NAVIGATE DRIVER LIST

The buttons displayed at the bottom of the Gantt chart allow you to customize the number of drivers displayed per page (e.g., 20, 40). Additionally, use the right and left arrows to navigate to the next, previous, last or first page.

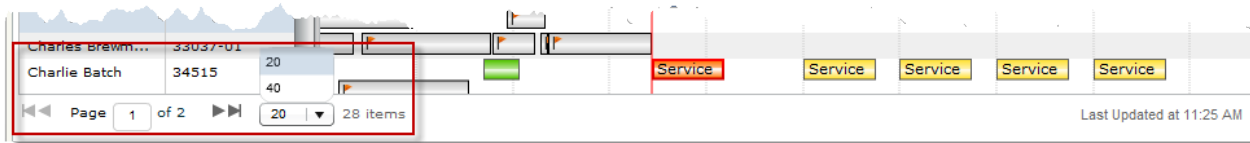


Figure 6: Driver List - Navigation Options

### 2.2.4 SEARCH FOR A DRIVER

Search for a specific driver by typing all or part of the driver's name in the Search Driver field displayed at the top of the Drivers frame. FleetOutlook displays a list of drivers who match the search criteria. Search capability is useful for large fleets to reduce the amount of time dispatchers or other FleetOutlook administrators spend scrolling through a list to find a driver.

#### To Search for a Driver:

- Start typing the driver's name in the Driver Search field.
- FleetOutlook filters the driver list to those drivers that match the search criteria.
- To clear the search and return the full list of drivers, click the **X** button.

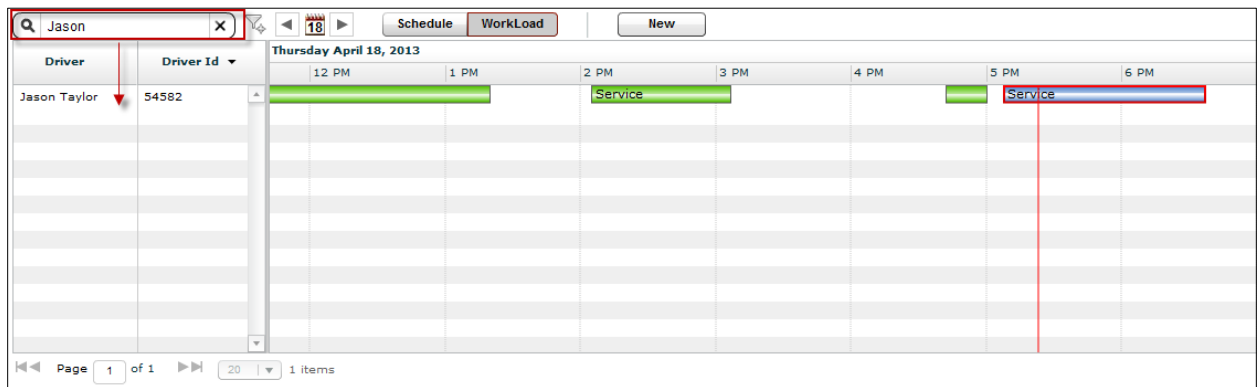


Figure 7: Search for a Driver

## 2.2.5 FILTER THE DRIVER LIST

The Filter option enables you to filter the Driver list to only those drivers who are active for the current day, by a vehicle category or by a driver category. When the Driver List is filtered, the Filter icon is shaded red. The shaded filter icon is useful to fleet dispatchers who may leave the TechDirect screen and need a visual indicator that the driver list is filtered when they return to it.

### To Filter the Driver List:

1. Click the **Filter** button.
- The Filter Driver List screen displays.

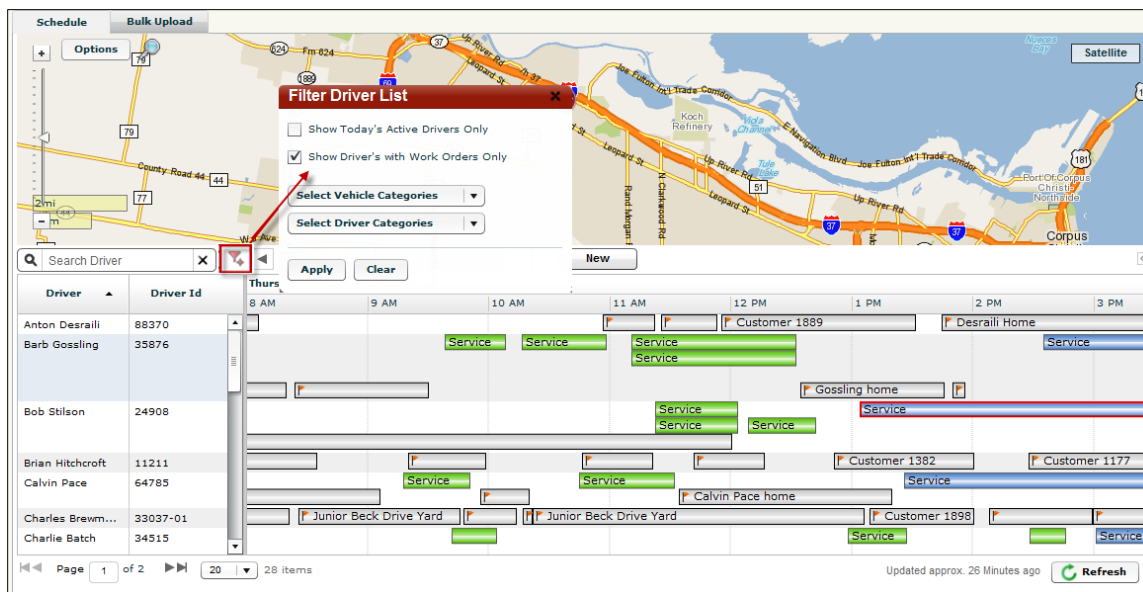


Figure 8: Filter Driver List

2. Select an option, and then click the **Apply** button (e.g., Active Drivers, Vehicle Category or Driver Category).
- FleetOutlook filters the Driver List and shades the Filter button red.
- To clear the filter, click the Filter button, and then click the **Clear** button.

## 2.2.6 CHANGE DATE SELECTION

By default, the TechDirect screen displays the assigned work orders for the current day. If you need to review the work order schedule or workload for a previous date, you can use the Calendar button to display work order data as far back as **XX** days.

### To Change the Date:

- Click the **Calendar** button above the Gantt chart, and then select a date from the Calendar screen.
- The date highlighted in green indicates the current date displayed. The date highlighted in gray indicates the date to be displayed.
- FleetOutlook populates the map and Gantt chart with the selected date's work order data.

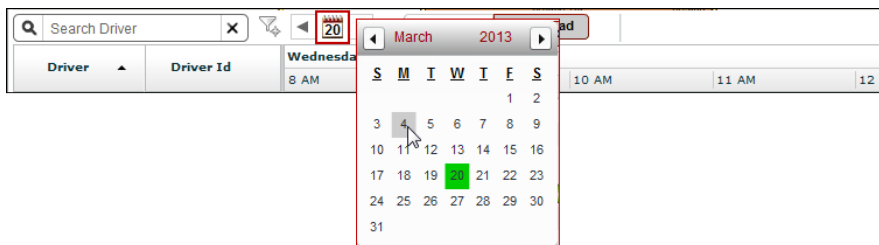


Figure 9: Date Selection Options

## 2.2.7 ADJUST TIME DISPLAY

The default time display on the Gantt chart is by hour intervals. You can adjust the time display to at 15-minute intervals or 1-minute intervals.

**Note:** To reset the time display to hour intervals, you must browse to a different date. When you return to the current day, FleetOutlook resets the time display to hourly.

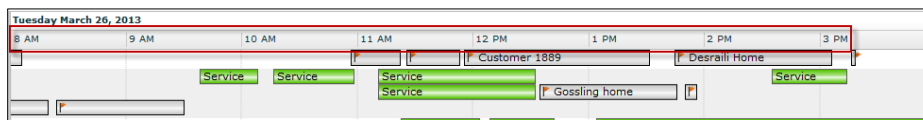


Figure 10: Time Display - Hourly

### To Adjust the Time Display:

- Click the Time bar to change the display to 15-minute intervals.



Figure 11: Time Display - 15-Minute Intervals

- Click the Time bar again to change the display to 1-minute intervals.

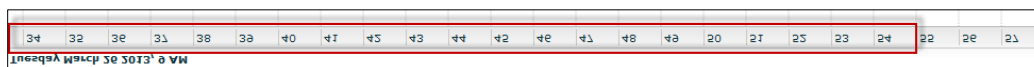


Figure 12: Time Display - One-Minute Intervals

### 3 WORK ORDERS

Work orders are the focus of TechDirect. Using TechDirect enables dispatchers to monitor the actual arrival and departure times for assigned jobs based on real-time GPS data for accurate reporting and compliance. Arrival and departure times are based on when the vehicle arrives and departs the work order location, not when the driver indicates arrival and departure.

TechDirect provides three methods for adding work orders: on-screen add, bulk upload or using OPI. Using OPI, TechDirect adds value to your traditional workforce management system by overlaying key work data from your workforce management application with real-time vehicle location data on a single FleetOutlook screen.

**Note:** For organizations merging TechDirect with an OPI, the option to add, edit, reassign or cancel a work order is not enabled by default. To enable these options, contact the FleetOutlook Customer Support Team.

#### 3.1 WORK ORDER RADIUS BY ZIP CODE

TechDirect enables you to define work order radius by Zip Code as well as a default radius for all work orders outside of any defined ZIP Codes. This enables you to define a smaller radius for an urban Zip Code and a larger radius for a rural Zip Code. Work orders in Zip Codes outside of those defined follow the default radius. You can define as many ZIP Codes as required for your organization; however, each ZIP code can only have one radius assigned.

**Note:** To define work order radius by Zip Code, contact the FleetOutlook Customer Support Team.

Zip Code	Radius (feet)
20170	500
22205	100

Figure 13: Adjustable Radius by ZIP Code

### 3.2 WORK ORDER TYPES

Similar to new adjustable radius by ZIP Code, TechDirect gives you the ability to define work order types and durations specific to your organization. TechDirect's Short Stop and Long Stop indicators are triggered off the work order type durations.

**Note:** To define work order types, contact the FleetOutlook Customer Support Team.

Allow Work Order Bulk Upload/Edit <input checked="" type="checkbox"/>		Default work order arrival radius <input type="text" value="1001"/> feet		
Work Order Status Mapping		Work Order Types	Radius by ZIP Code	
Customer Code	Description	Minimum Time	Standard Time	Maximum Time
Disconnect	Disconnect	15	30	45

Figure 14: Adjustable Duration by Work Order Type

### 3.3 VIEW A WORK ORDER

When you select a work order for the Gantt chart, FleetOutlook displays the Work Order screen on the right-side of the chart. FleetOutlook also centers the map to the work order location. You can hide the Work Order screen displayed on the Gantt chart by clicking the Collapse arrow directly above it.

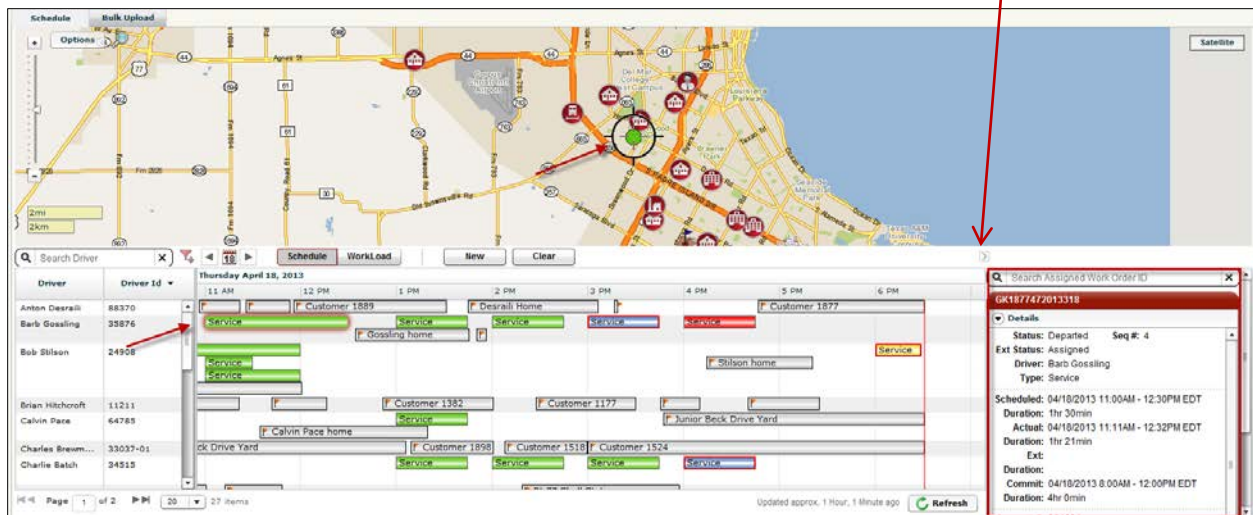


Figure 15: View a Work Order

### 3.4 ADD A WORK ORDER

You can add a single work order directly from the TechDirect screen using the New button. This feature is useful for dispatchers assigning an emergency service call.

#### To Add a Work Order:

3. Click the **New** button.
- The New Work Order screen displays.

**New Work Order**

Status: Incomplete Seq#:

Ext Status:

Driver: AA 2308 - AA2308

Type: Install

Scheduled: 10/14/13 8 : 00 AM - 9 : 00 AM

Duration: 1hr 0min

Actual:

Duration:

Commit: 10/14/13 7 : 00 AM - 10 : 00 AM

Account #:

Name: Charlie Smith

Address: 13645 Dulles Technology Drive

Address 2:

Herndon VA 20171

Phone: 703.262.4000

Lat/Lon: Latitude Longitude

Notes: Send notes directly to the driver's Garmin screen.

Save Cancel

**Figure 16: New Work Order Screen**

4. The select the **Driver** name from the drop-down list.
- You must assign the work order to a driver. If you do not assign a driver, the work order does not display on the Gantt chart. You can only view unassigned work orders by toggling on the option on the map.
5. Select the work order **Type** from the drop-down list.
6. Specify the **Schedule** Date, Start and End Times.
7. Specify the **Commit** Date, Start and End Times.
- The **Account #** field is user-defined field and is not required. If you do not enter an account number, FleetOutlook automatically assigns a number.
8. Populate the **Name** fields.
- Both Name fields are required.



9. Populate the **Address** fields or **Lat/Lon** fields.

- If you enter the full address, the Lat/Lon fields are not required. If you enter the Lat/Lon, the Address fields are not required.

10. Click the **Save** button.

- FleetOutlook creates the work order and displays a yellow bar on the driver's row on the Gantt chart. The bar is color-coded yellow until the driver arrives at the work order location.

### 3.5 EDIT A WORK ORDER

You can edit work orders as needed; however, we recommend that you do not make changes after the driver arrives at the work order location.

#### To Edit a Work Order:

- Select the work order from the Gantt chart, and then click the **Edit** button.
- The Edit Work Order screen displays.

Figure 17: Edit Work Order Screen

- Update the work order as needed, and then click the **Save** button.

### 3.6 REASSIGN A WORK ORDER

One of the benefits of utilizing the Workload view on the Gantt chart is that dispatchers have the capability to reassign work orders. You can adjust the workload for a driver by reassigning work orders to other drivers in the same group.

#### To Reassign a Work Order Using the Work Order Screen:

1. Select the work order on the Gantt chart or on the map.
2. Click the **Edit** button.

The screenshot shows the 'Edit - 71361015' window. A red box highlights the 'Driver' dropdown menu, which is currently set to 'Bob Smith - Bob\_Smith'. Other options in the dropdown include 'Carmell Oliver - Carmell', 'Chris Martin - 54013 Martin', 'Christine Ragan - CR 123', 'Doug Laneman - 75839 Lanem', and 'Ed Fenley - 44928 Fenley'. The 'Type' is 'Bob Smith - 1111'. The 'Scheduled' time is '4 : 00 PM'. The 'Duration' is 'Driver Support Vehicle - TEST'. The 'Actual' time is '5 : 00 PM'. The 'Commit' is 'Ed Fenley - 44928 Fenley'. The 'Account #' is 'John Jones - John\_Jones'. The 'Name' is 'CalAmp Corp.' and the 'Address' is '13645 Dulles Technology Drive'.

Figure 18: Reassign Driver Using Edit Work Order Screen

3. Select a new Driver from the drop-down list, and then click the **Save** button.

#### To Reassign a Work Order Using Drag and Drop:

1. Move a work order from the assigned driver's row to the new driver using a drag-and-drop operation.
2. Click the **Yes** button to confirm driver reassignment.

The screenshot shows a Gantt chart with a time axis from 11 AM to 3 PM. A work order is being dragged from one driver's row to another. A 'Confirm Update' dialog box is displayed, asking: 'Reassign 71361015 to John Jones and reschedule for 2:18 PM - 3:18 PM?'. The dialog has 'Yes' and 'No' buttons. In the background, the '71361015' details window is visible, showing 'Status: Incomplete', 'Seq #: 0', 'Driver: Bob Smith', 'Type: Disconnect', 'Scheduled: 04/22/2013 3:00PM - 4:00PM EDT', 'Duration: 1hr 0min', 'Ext: Duration: Commit: 04/22/2013 2:00PM - 5:00PM EDT', and 'Duration: 3hr 0min'. The 'Disconnect' button is highlighted in the Gantt chart.

Figure 19: Reassign Work Order Using Drag-and-Drop Operation

### 3.7 CANCEL A WORK ORDER

TechDirect allows you to cancel both assigned and unassigned work orders. Cancelled work orders do not display on the Gantt chart or map. You can view cancelled work orders on the Work Order Report.

#### To Cancel a Work Order:

1. Select the work order on the Gantt chart or on the map.
2. Click the **Cancel** button.

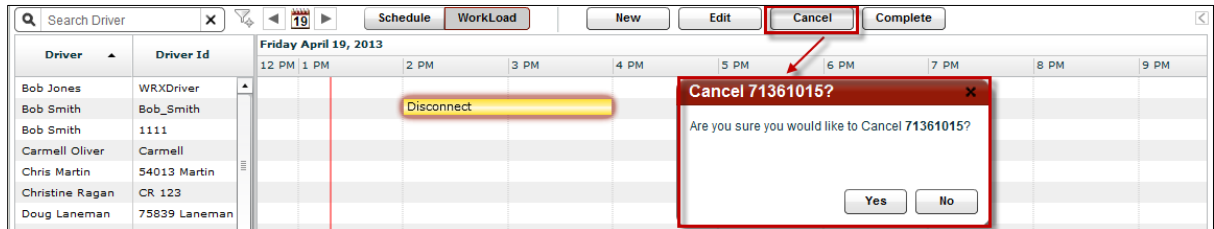


Figure 20: Cancel a Work Order

3. Click the **Yes** button to confirm cancellation.
- FleetOutlook removes the work order from the TechDirect screen.

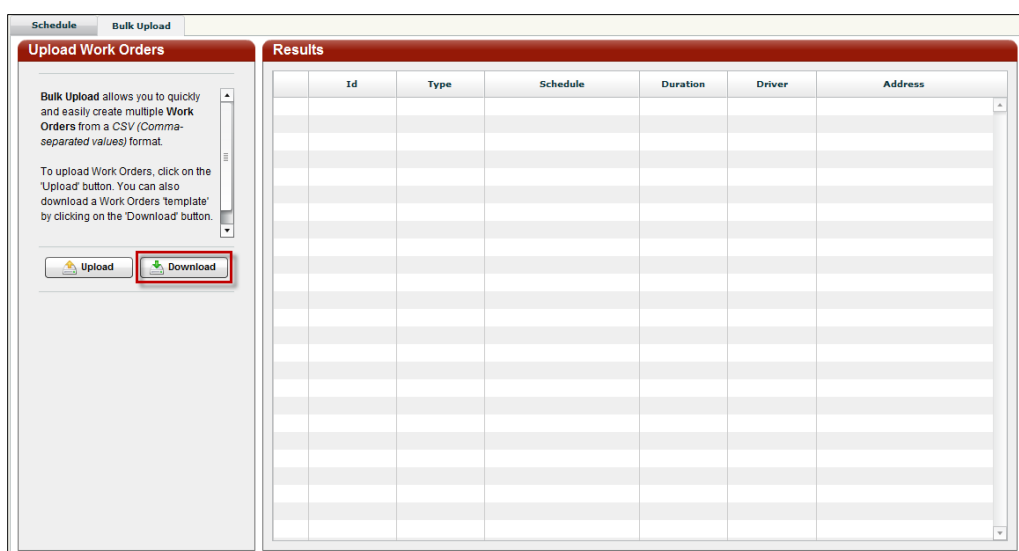
### 3.8 WORK ORDER BULK UPLOAD

You can upload and assign numerous work orders at once using TechDirect's Bulk Upload feature. Bulk Upload uses a CSV formatted file, which allows you to quickly assign numerous work orders with a single action.

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

### To Bulk Upload Work Orders:

1. From the TechDirect tab, select the **Bulk Upload** sub-tab.



**Figure 21: TechDirect Bulk Upload Screen**

2. Click the **Download** button.
  - FleetOutlook downloads a template in CSV format with a predefined layout for entering work order locations.
  - The Save As dialog box displays.
3. Navigate to where you want to store the template, and then click the **Save** button.
4. Open the Work Order template from the save location.

[illegible]

**Figure 22: Sample Work Order Template**

5. Delete the sample rows, and then add the information for your work orders.

6. Populate all columns unless marked optional. If a required column is blank, the upload for that work order will fail.
- 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.

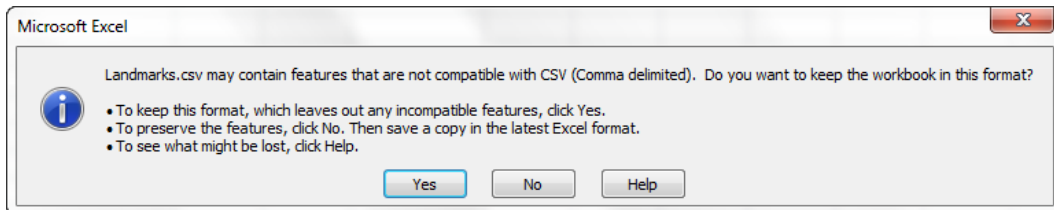


Figure 23: Excel Warning Message

8. Navigate back to the TechDirect Bulk Upload tab, and then click the **Upload** button.
- The Open dialog box displays.
9. Navigate to the saved template location, select the template, and then click the **Open** button.
- FleetOutlook uploads the work orders and displays a validation message.

Id	Type	Schedule	Duration	Driver	Address
123		04/19/2013 12:00PM - 12:00PM EDT	0hr 0min		13645 Dulles Technology Drive, Herndon VA, 20171
71370489	Disconnect	04/19/2013 3:00PM - 3:00PM EDT	0hr 0min		13645 Dulles Technology Drive, Herndon VA, 20171

Work Order Id: 71370489  
 Ext Status: Status: Unassigned  
 Ext. Driver Id: Bob\_smith  
 Type: Disconnect  
 Scheduled: 04/19/13 3 : 00 PM - 3 : 00 PM  
 Duration: 0hr 0min  
 Commit: 04/19/13 3 : 00 PM - 7 : 00 PM  
 Account #: Name: CalAmp Corp  
 Address: 13645 Dulles Technology Drive  
 Address 2: Herndon VA 20171  
 Phone: Lat/Lon: 38.955967 -77.415112

Validation Completed  
 All items have been successfully validated.  
 Click 'Save All' to Publish.  
 2 Work Orders successfully validated.  
 Discard All Save All

Figure 24: Bulk Upload Review Screen

10. Select any row from the Results list and FleetOutlook opens the row for editing.
- If a stop location fails, you can edit the failed fields directly in FleetOutlook. After you have updated the failed fields, click the Apply button.
11. Click the **Save All** button to send the work order assignments to TechDirect.

### 3.8.1 WORK ORDER TEMPLATE COLUMNS

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

Column	Description
<b>Work Order ID</b>	Optional.
<b>Operator ID</b>	Driver ID.
<b>Job Number</b>	Optional.
<b>Schedule Date</b>	Use MM/DD/YYYY format.
<b>Schedule Start</b>	Use military time format – hh:mm.
<b>Schedule Duration</b>	Use military time format – hh:mm.
<b>Customer Commit Date</b>	Use MM/DD/YYYY format.
<b>Customer Commit Start Time</b>	Use military time format – hh:mm.
<b>Customer Commit End Time</b>	Use military time format – hh:mm.
<b>Work Order Type</b>	
<b>External Status</b>	Assigned. If you did not assign the Driver ID, leave blank.
<b>Account Number</b>	Optional.
<b>Customer Last Name</b>	
<b>Customer First Name</b>	
<b>Street Address</b>	Include both street number and street name. This field is required unless you supply latitude/longitude coordinates.
<b>City</b>	This field is required unless you supply latitude/longitude coordinates.
<b>County</b>	This field is required unless you supply latitude/longitude coordinates.
<b>State</b>	Two-letter state abbreviation or full state name. This field is required unless you supply latitude/longitude coordinates.
<b>Postal Code</b>	Use the 5-digit ZIP code. This field is required unless you supply latitude/longitude coordinates.
<b>Customer Primary Phone</b>	Optional.
<b>Latitude</b>	Use the latitude coordinate for the landmark anchor point. This field is required unless you supply the complete address.
<b>Longitude</b>	Use the longitude coordinate for the landmark anchor point. This field is required unless you supply the complete address.

### 3.9 VIEWING WORK ORDERS IN THE BREADCRUMB DETAIL

FleetOutlook displays work order information on the Breadcrumb Detail map, which enables fleet dispatchers to review a driver's route to or from a work order location.

#### To View a Work Order in Breadcrumb Detail:

1. Select the **Tracking** tab, and then select the **Breadcrumb Detail** tab.
2. Select the **Vehicle** from the drop-down list.
  - FleetOutlook displays all the events for the selected vehicle in a list and as a route overview on the map.
3. Select a work order icon on the map and FleetOutlook displays the Work Order Tool Tip.

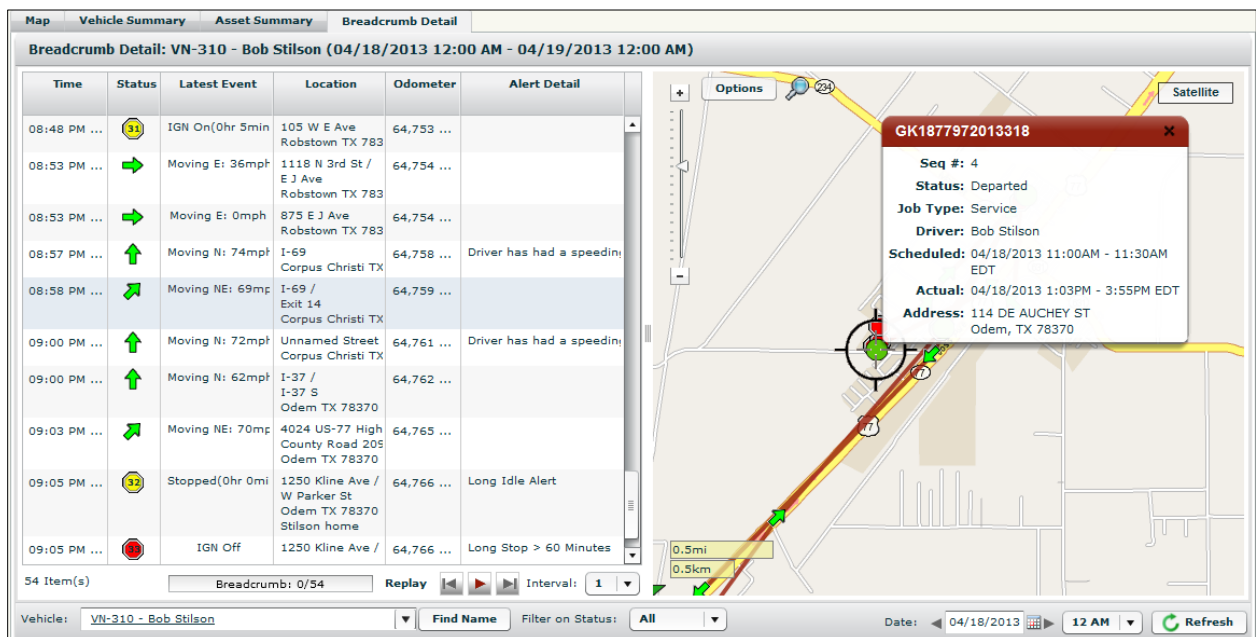


Figure 25: Work Orders on the BreadCrumb Detail Map

- Work orders associated with the assigned driver are displayed on the map as either a yellow or a green circle.
- A yellow circle indicates that the driver has not arrived to the work order location.
- A green circle indicates that the driver has arrived at the work order location.
- A blue circle indicates that the driver has departed the work order location.

### 3.10 VIEWING WORK ORDERS IN TECHCONNECT

Displaying work orders on the TechConnect screen is beneficial for customers using TechConnect for two-way communication between dispatchers and drivers. This allows dispatchers to see the current status of a work order and communicate with the driver on a single screen.

#### To View Work Order Status in TechConnect:

1. Select the **TechConnect** tab, and then select the driver from the Drivers frame.
- You can also select the Stops folder from the Folders frame. The Stops folder contains all the messages with a stop attached sent to your fleet or selected group.
2. Select the message containing the work order from the Messages frame.
- TechConnect displays message details in the Details frame.

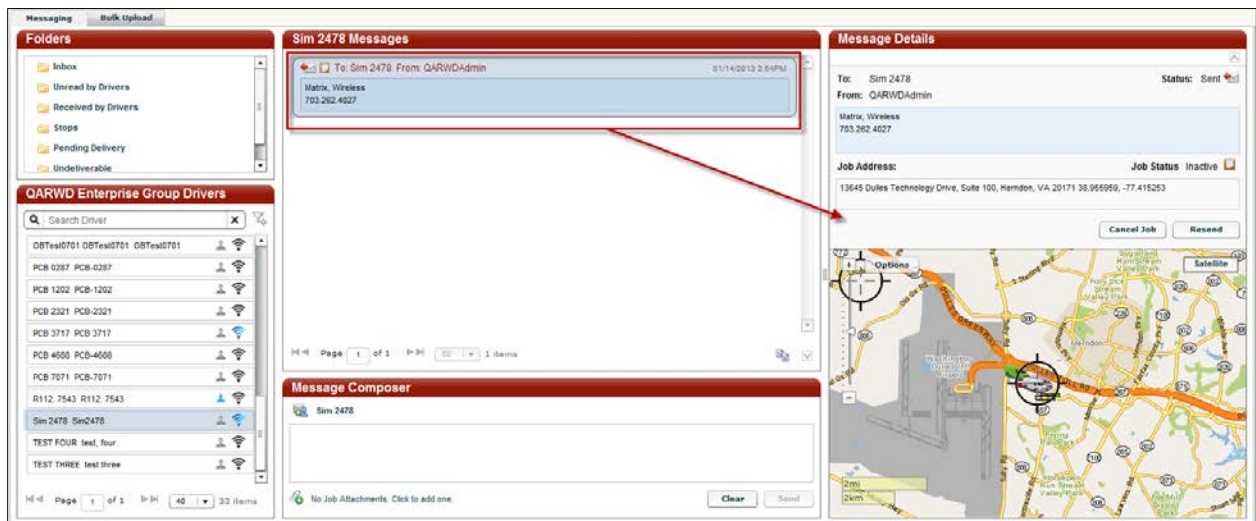


Figure 26: Work Order Displayed in TechConnect

- From the TechConnect screen, you can cancel the work order or resend the work order message.
- The Job Status field in the message details and the corresponding color-coded icon displayed on the map indicate the work order status.



## 4 WORK ORDER REPORTING

FleetOutlook provides a highly customizable and flexible Interactive Report Platform (IRP) for generating work-order related reports.

Once generated, you may opt to display report data directly within FleetOutlook or export to PDF, CSV or HTML formats as well as schedule for automatic email delivery.

**Note:** Refer to the FleetOutlook User Guide for detailed instructions on setting up, customizing and scheduling reports.

Report	Description
<b>Work Order Report</b>	Displays a list of work orders performed over a given date range, allowing you to quickly see what work orders were completed, when they were scheduled to be completed and the time it took to complete them.
<b>Work Order Metric Report</b>	Displays a view of each group's overall work order statistics and also each driver's work order statistics in a summarized arrangement.
<b>Trip Report</b>	Provides a segmented view of a driver's day, highlighting each major leg during the day and any work orders or landmarks associated with each leg.

Driver ID	Driver First Name	Driver Last Name	Job ID	Job Status	Job Status WMS	Scheduled Start	Customer Commit Start	Arrival Time	Customer Commit End	Departure Time	Duration	Work Order Type	Customer ID	Customer Name	Street Address	City	State	Zip Code
42644	Henry	Spiffner	GK1870002013318	Departed	Assigned	18-Apr-2013 03:00:00 PM EDT	18-Apr-2013 01:00:00 PM EDT	18-Apr-2013 04:06:20 PM EDT	18-Apr-2013 04:00:00 PM EDT	18-Apr-2013 05:33:23 PM EDT	1h:27m	Service	878282	Sarah Smith	949 Raven St	Corpus Christi	TX	78418
42644	Henry	Spiffner	GK1876892013318	Departed	Assigned	18-Apr-2013 01:00:00 PM EDT	18-Apr-2013 01:00:00 PM EDT	18-Apr-2013 02:11:37 PM EDT	18-Apr-2013 04:00:00 PM EDT	18-Apr-2013 03:37:06 PM EDT	1h:25m	Service	277462	James Jones	1047 LANG RD	Portland	TX	78374
42644	Henry	Spiffner	GK1876912013318	Departed	Assigned	18-Apr-2013 05:00:00 PM EDT	18-Apr-2013 03:00:00 PM EDT	18-Apr-2013 07:03:16 PM EDT	18-Apr-2013 06:00:00 PM EDT	18-Apr-2013 07:32:32 PM EDT	0h:29m	Service	392169	Barbara Lopez	446 JUDIE CT	Corpus Christi	TX	78418
38949	Marcos	Imelda	GK1876922013318	Departed	Assigned	18-Apr-2013 10:00:00 AM EDT	18-Apr-2013 08:00:00 AM EDT	18-Apr-2013 11:07:57 AM EDT	18-Apr-2013 12:00:00 PM EDT	18-Apr-2013 12:01:39 PM EDT	0h:53m	Service	718647	Karen Wilson	351 S KATHLEEN ST	Beeville	TX	78102
38949	Marcos	Imelda	GK1876942013318	Departed	Assigned	18-Apr-2013 11:00:00 AM EDT	18-Apr-2013 08:00:00 AM EDT	18-Apr-2013 12:10:25 PM EDT	18-Apr-2013 12:00:00 PM EDT	18-Apr-2013 01:07:43 PM EDT	0h:57m	Service	356553	Darrell Smith	324 SANDOVAL ST	Beeville	TX	78102
38949	Marcos	Imelda	GK1876972013318	Departed	Assigned	18-Apr-2013 01:00:00 AM EDT	18-Apr-2013 01:00:00 PM EDT	18-Apr-2013 02:22:33 PM EDT	18-Apr-2013 04:00:00 PM EDT	18-Apr-2013 03:19:48 PM EDT	0h:57m	Service	696280	Sheila Wilson	551 W CARTER ST	Beeville	TX	78102
54582	Jason	Taylor	GK1876992013318	Departed	Assigned	18-Apr-2013 09:00:00 AM EDT	18-Apr-2013 08:00:00 AM EDT	18-Apr-2013 10:45:51 AM EDT	18-Apr-2013 12:00:00 PM EDT	18-Apr-2013 01:20:00 PM EDT	2h:34m	Service	285405	Jacqueline Rogers	519 NICHOLS ST	Mathis	TX	78368

Figure 27: Work Order Report Example