FleetOutlook® Summer 2011 Release Notes
Version 6.3

Last Updated: June 24, 2011

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Introduction

These Release Notes contain new features that are available in our Summer Release (Version 6.3).

Dashboard Tab Update

Additional Metrics

The Dashboard Tab now includes additional metrics, providing users 47 total metrics on which to report. The metrics are based on data available in the Interactive Reports Platform and fall within two categories: (1) driver-based metrics (available since 6.2), found under the Driver Utilization Report, and (2) vehicle-based metrics, found under the Vehicle Metrics Report.

When users edit the Dashboard to select the metrics they want to track, the 19 new driver-based metrics will be visible. These new metrics highlight driver productivity, including the first landmark departure or work order arrival of the day. FleetOutlook users can also monitor the percentage of the day spent at customer locations, providing insight into how much of a driver's day was spent on productive work versus driving to/from customer locations.

Dashboard Benchmarks

Also new in 6.3 is the ability to have a benchmark, or goal line, on each chart to compare how the group is performing against its goals, at a glance. Each chart can have a single benchmark assigned. Like the other dashboard features, users can set customized benchmarks to meet their own needs. There are three options for benchmarks:

1. **Line:** Displays a line on the screen at a certain Y axis point.

2. **Greater than:** Shows only those groups, drivers or data points that are above a certain threshold.

3. **Less than:** Shows only those groups, drivers or data points that are below a certain threshold.
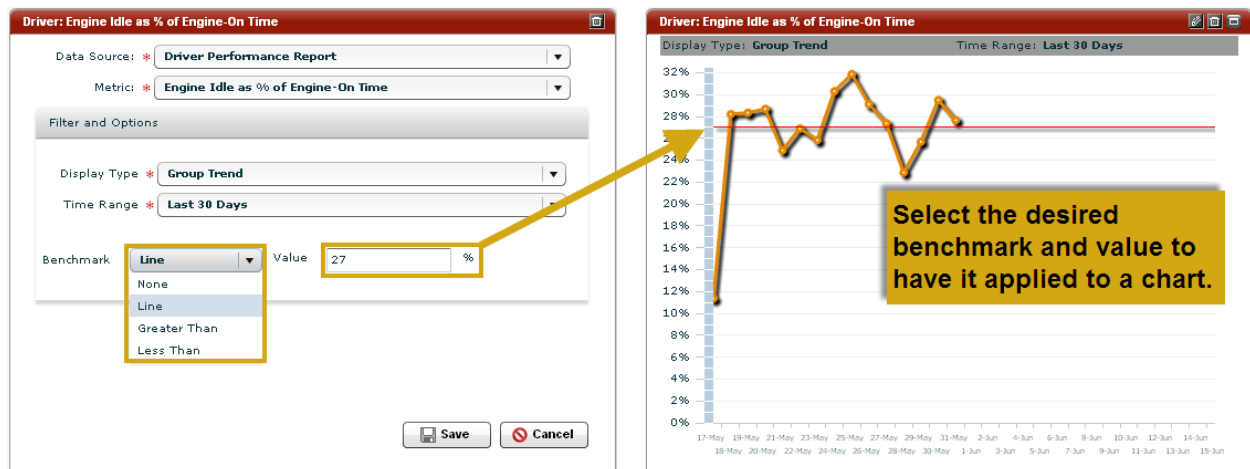
Group Chooser Search

The Group Chooser now has a search function that allows users to rapidly locate a group name within the hierarchy. Simply type in the name or part of the name of any group and the list will be filtered to show the group and its parents.
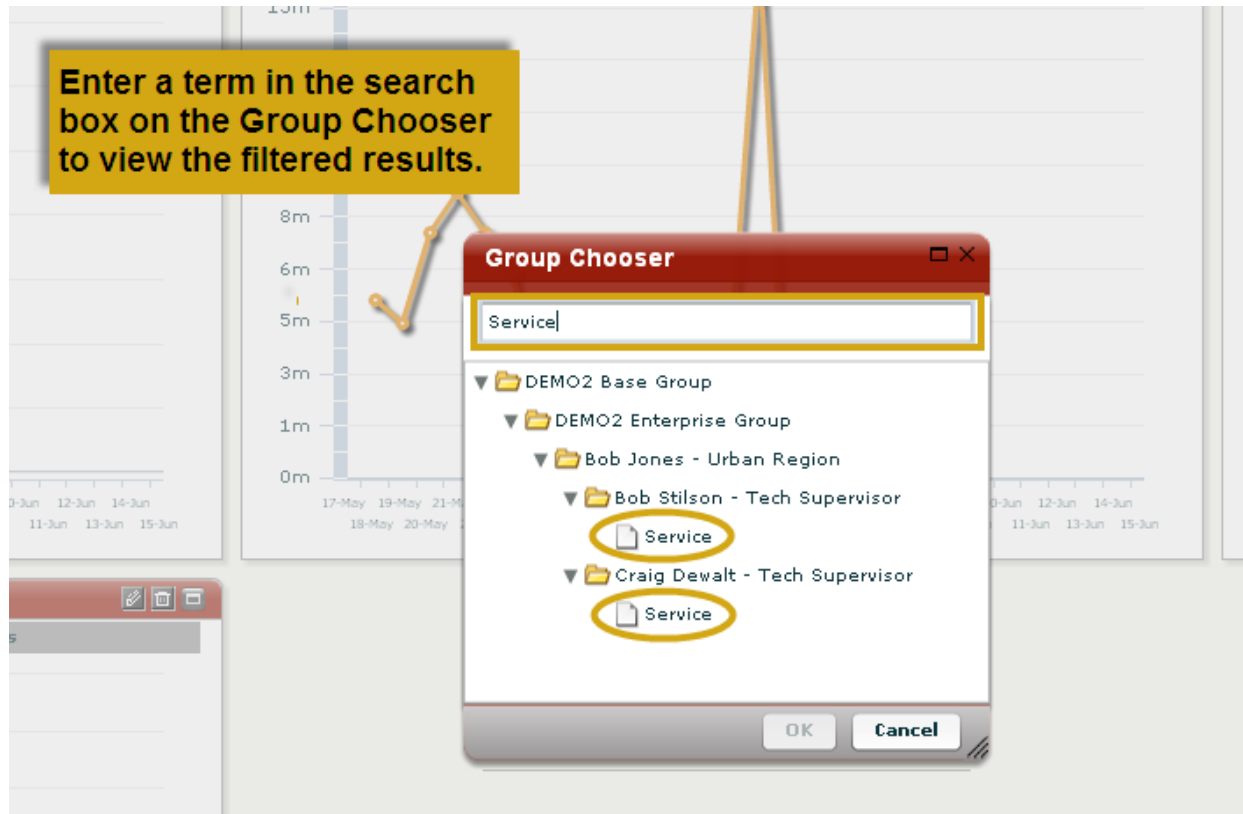
Tracking Tab Updates

Group Filtering

The Map SubTab now has a group filter menu on the right side of the screen. The menu will display all subgroups available to users and allow them to quickly select or de-select which subgroups to display on the map. The filter will be open by default. To collapse the filter click the arrow on the left side of the filter window.

Note: The group filter will only show the subgroups of the group selected in the Group Chooser at the top of FleetOutlook.
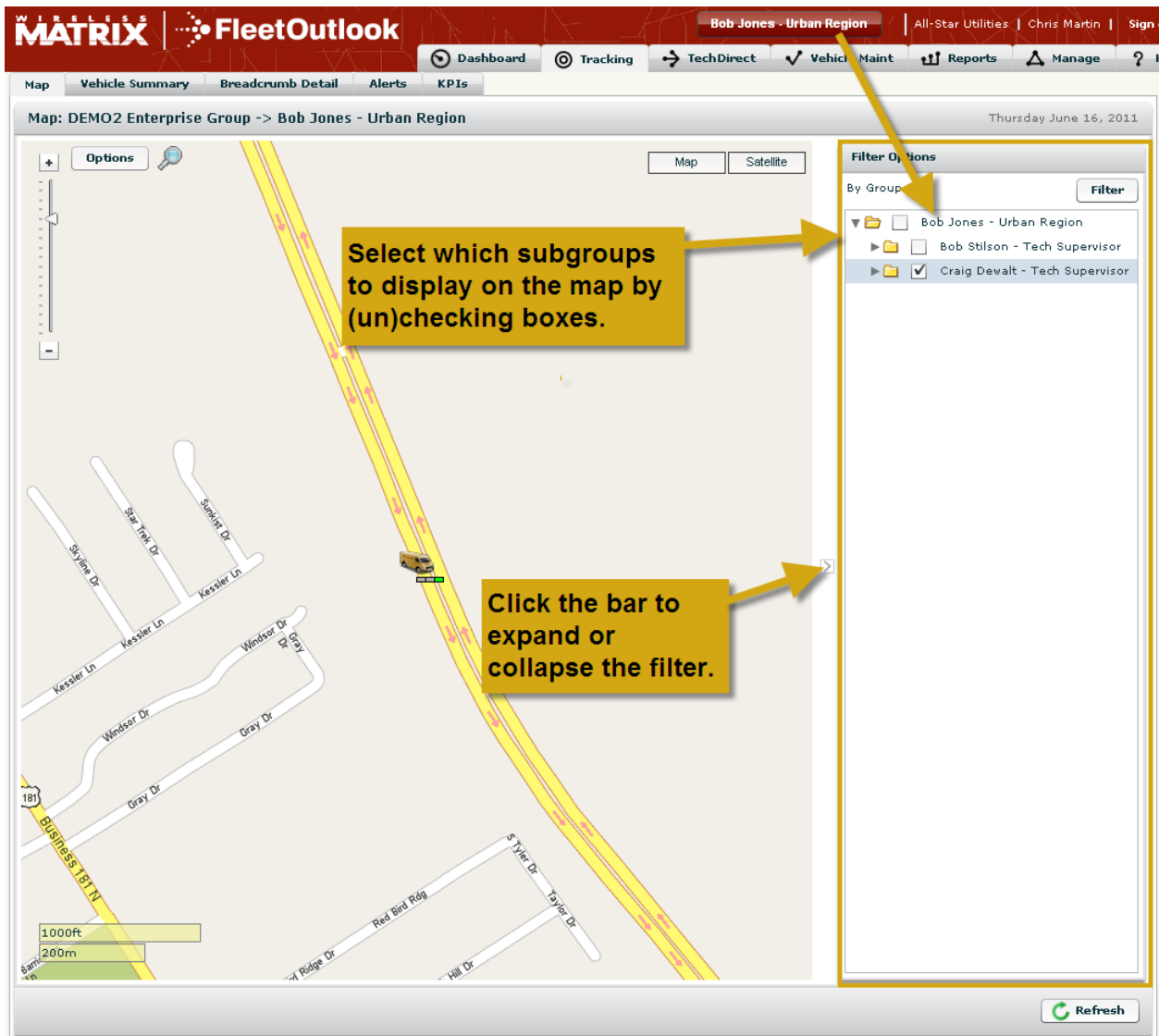
Vehicle Search

Users can now search for vehicles, in addition to addresses, in the search bar on the Map SubTab. Simply type any part of the Vehicle ID or Vehicle Name in the search box and FleetOutlook will present a list of matching vehicles. Once a vehicle has been selected, the map will automatically center on its location. For addresses, the map will center on the location and a pushpin will also be placed on the map to denote it.

Note: FleetOutlook will only search within the group selected in the Group Chooser for the driver or vehicle.
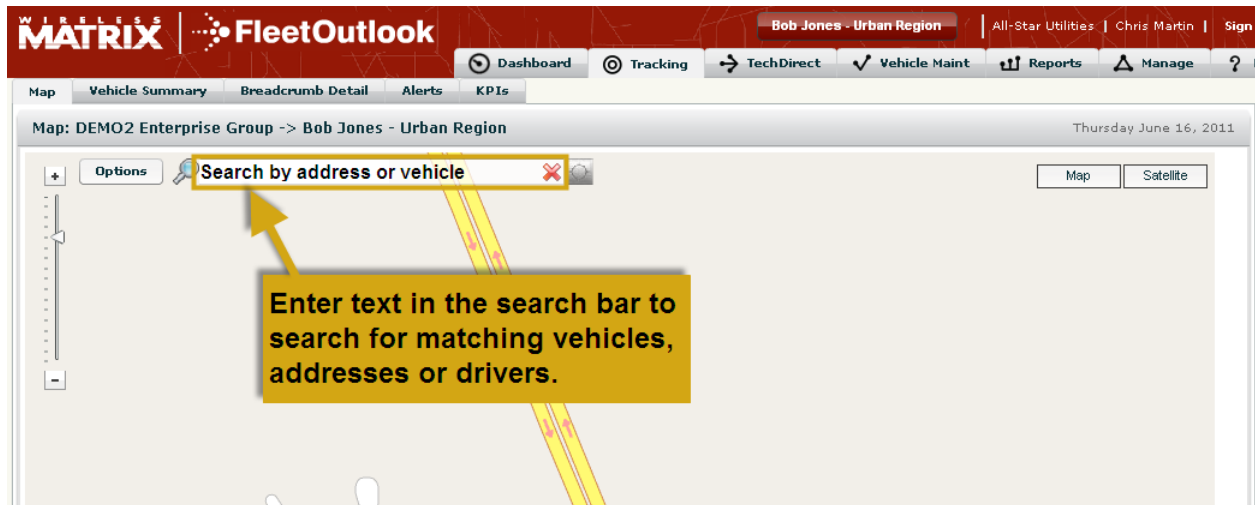
Interactive Reports Update

Cell Shading

Users can select to have cells automatically shaded in a column whenever data in that column is above, below or equal to a specific value. Shading cells that meet specific criteria allows users to quickly scan through a report to find actionable data. Users can select the color they want the cell to be shaded, red, yellow or green, and can select multiple criteria within the same column.

To define a shading rule, users need to click the drop down arrow on the desired column, select the "Set Shading Rules" menu item, and enter the desired shading rule.

Note: Cell shading is only available for numerical columns in a report.

Additional Interactive Reports

We are continuing to add interactive reports to FleetOutlook. In total there are eight interactive reports currently available in the Interactive Reports SubTab. A list of the available reports, as well as a brief summary of what each one does, is provided below:

1. **Driver Performance Report:** Provides 19 measurements of fleet performance, including new idle metrics such as idle minutes per stop and idle minutes per day. It also includes new metrics on driver start and end times, including the average first ignition on and last ignition off times.

2. **Alerts Report:** Provides a summary and detail view of alerts, and allows users to limit the results using the time period, vehicle grouping and/or type of alert.

3. **Driver Utilization Report:** Focuses on the start of day and end of day activities. It is typically used to validate both timecards and driver productivity.

Note: For FleetOutlook Platinum customers, this report captures the first and last work order arrival and departure times.

4. **Auxiliary Input Report:** Provides the detailed history for inputs that are providing data to the in-vehicle device, allowing users to quickly see when an input was turned on and how long it was active. Typical inputs include a seat belt, power take off (PTO) and bucket up.

   Note: Customers must wire sensors to the GPS device in order to monitor auxiliary inputs.

5. **Driver Trip Report:** Provides a segmented view of a driver's day, highlighting each major trip leg during the work day and the work orders or landmarks associated with that leg.

   Note: For FleetOutlook Platinum customers, this report associates significant stops with the work order ID at that location and also highlights stops not related to a work order or landmark.

6. **Device Activity Report:** Uses device history data to determine whether a device is working properly.

7. **Vehicle Maintenance Report:** Uses data from the Vehicle Maintenance Module to provide a summary of maintenance events.

8. **Work Order Report:** Displays a list of work orders performed over a given period of time, allowing users to quickly see what work orders were completed, when they were scheduled to be completed, and the time it took to complete them.

   Note: This report is available to FleetOutlook Platinum customers only as it requires work order data. Work order data can be loaded into FleetOutlook through integration with a third-party workforce management system or a manual upload of the work orders.

For more information on FleetOutlook's Reports, please visit FleetOutlook Help.

Note: We have been moving reports from the Performance and Exception Reports SubTabs into the Interactive Reports SubTab.

Once all reports have been moved, we will remove the Performance and Exception Reports SubTabs from FleetOutlook. If a report on a specific SubTab is no longer available, please look in the Interactive Reports SubTab for a similar report.

Enterprise/Local Time

This feature is designed for businesses with offices across multiple time zones. For these businesses, users generating reports in a time zone other than the one assigned to their FleetOutlook enterprise will have the ability to specify whether to use the local or enterprise time zone.
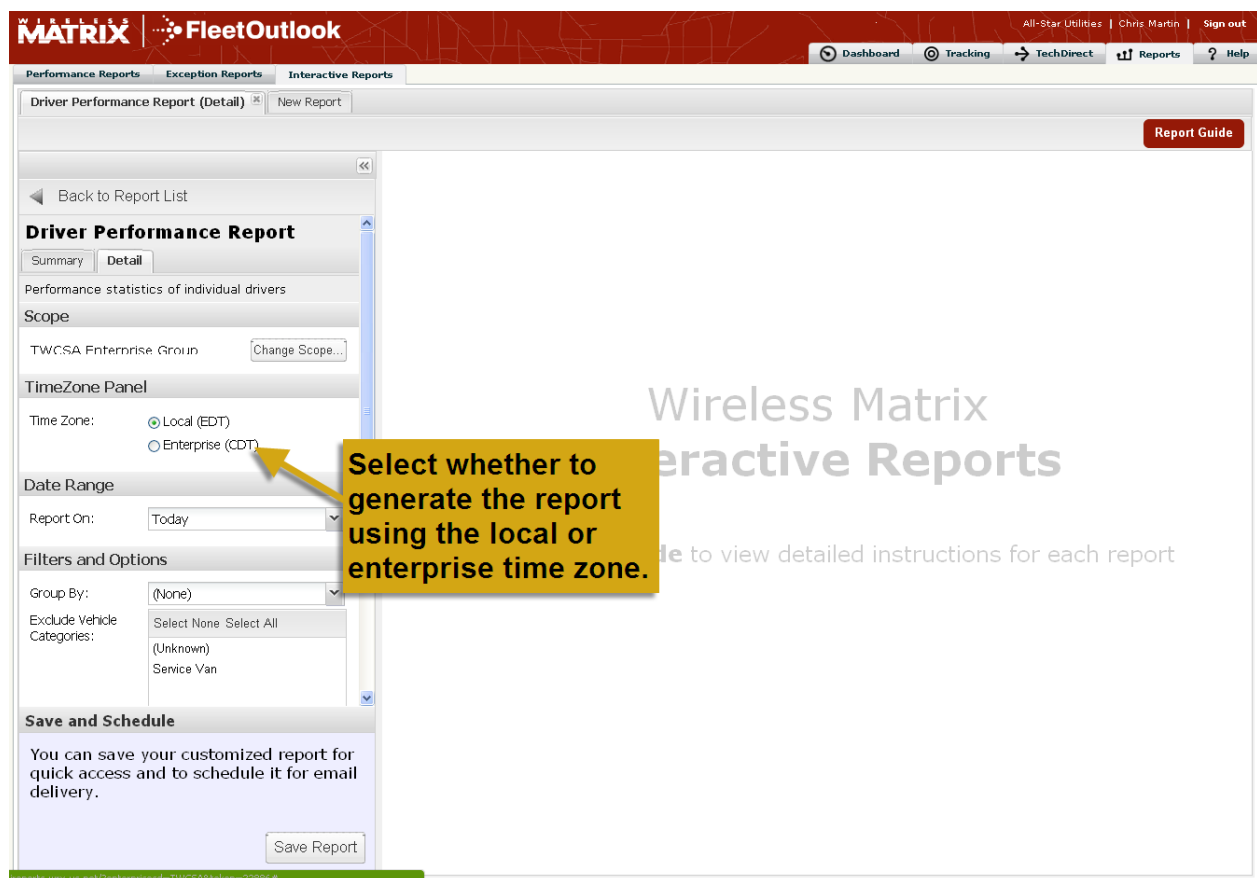
Manage Tab

Driver Schedules

Users can now access Driver Schedules directly from the Manage Tab in FleetOutlook, allowing them to define the days drivers are scheduled to work and their workday hours

from within FleetOutlook. Previously the Driver Schedule feature was only accessible in FleetOutlook Admin. To view, edit or assign Driver Schedules using the Manage Tab, select the Manage Tab and click the Driver SubTab. From there a user can assign or re-assign a driver schedule by selecting a driver and clicking the Assign Schedule button at the bottom of the screen. To do so, select the desired Schedule Profile for that driver and click Assign.

After selecting the appropriate driver, select the desired Schedule Profile and click Assign.

Schedule Profile

Schedule Profiles can now be created directly from the Manage Tab in FleetOutlook. Previously the Schedule Profile feature was only accessible in FleetOutlook Admin. To edit or add a new Schedule Profile, first select the Manage Tab, second select the Manage Resources SubTab, and third the Schedule Profile SubTab. From the Schedule Profile SubTab, users can select to either add a new Schedule Profile or edit an existing Schedule Profile.
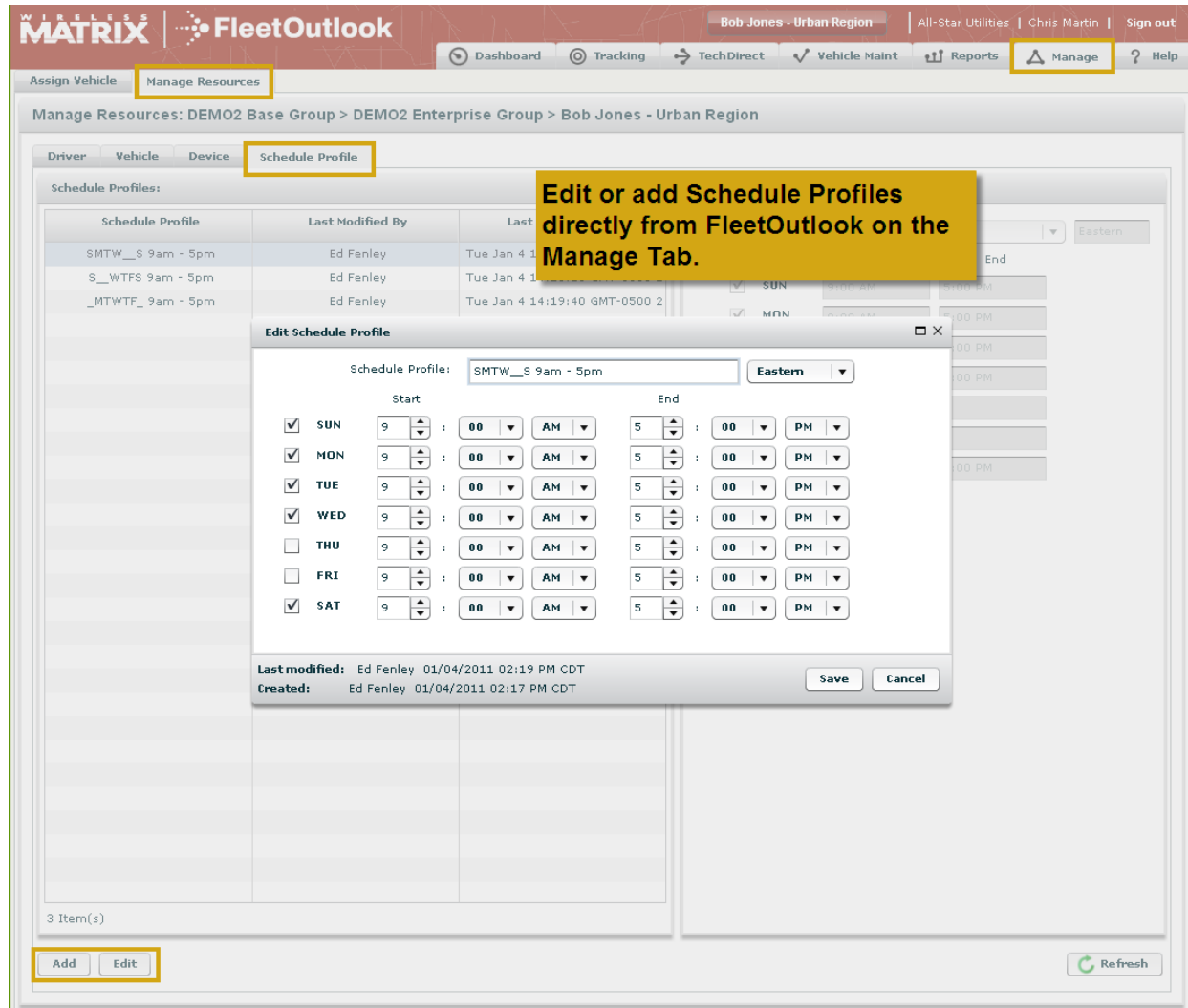
Driver Category

Drivers can now be assigned a Driver Category, similar to how vehicles could be assigned a Vehicle Category in FleetOutlook previously. An example of a Driver Category may be the skill level of the driver.

The Driver Category can currently be used as a filter on several Alerts and is scheduled to be available on additional Alerts and Reports in the future. The Driver Category is a free text field enabling users to enter any name for a Driver Category, and if it does not already exist, it will be created.

Users can assign a Driver Category in either FleetOutlook or FleetOutlook Admin. To assign a Driver Category using FleetOutlook, go to the Manage Tab, click on the Manage Resources SubTab and then the Driver SubTab. From there, select the driver to assign a category to and click the Edit button. Then either select an existing Driver Category or enter a new Driver Category, and click OK.

To assign a Driver category in FleetOutlook Admin, first click on the Driver Tab, second select the driver to assign a category to and click the Edit button. From there, either select an existing Driver Category or enter a new Driver Category, and click Save.

Driver Category Filter

The Driver Category filter is now available on two alerts in FleetOutlook, the **Long Idle Alert** and the **Long Stop Alert.** Both alerts previously allowed users to filter who the alert was applied to based off of the Vehicle Category. The Driver Category filter functions the same way, allowing users to limit the alert so it is only applied to a specific Driver Category.

Landmarks and Alerts Audit History

Administrators now have access to audit history for Landmarks and Alerts in FleetOutlook Admin. To access the audit history, select either the Landmarks or Alerts Tab, select a specific landmark or alert, and click the Audit button. A list of changes for that record will be displayed in a pop-up window.

TechDirect® Update

TechDirect is only available in FleetOutlook's Platinum package. For more information about TechDirect, please contact your sales representative.

Customer Commitment Window

The tool-tip in TechDirect now includes the customer commitment window when available. This allows users to quickly view the work order ID, scheduled time and customer commitment window by hovering over a work order in the Gantt chart.
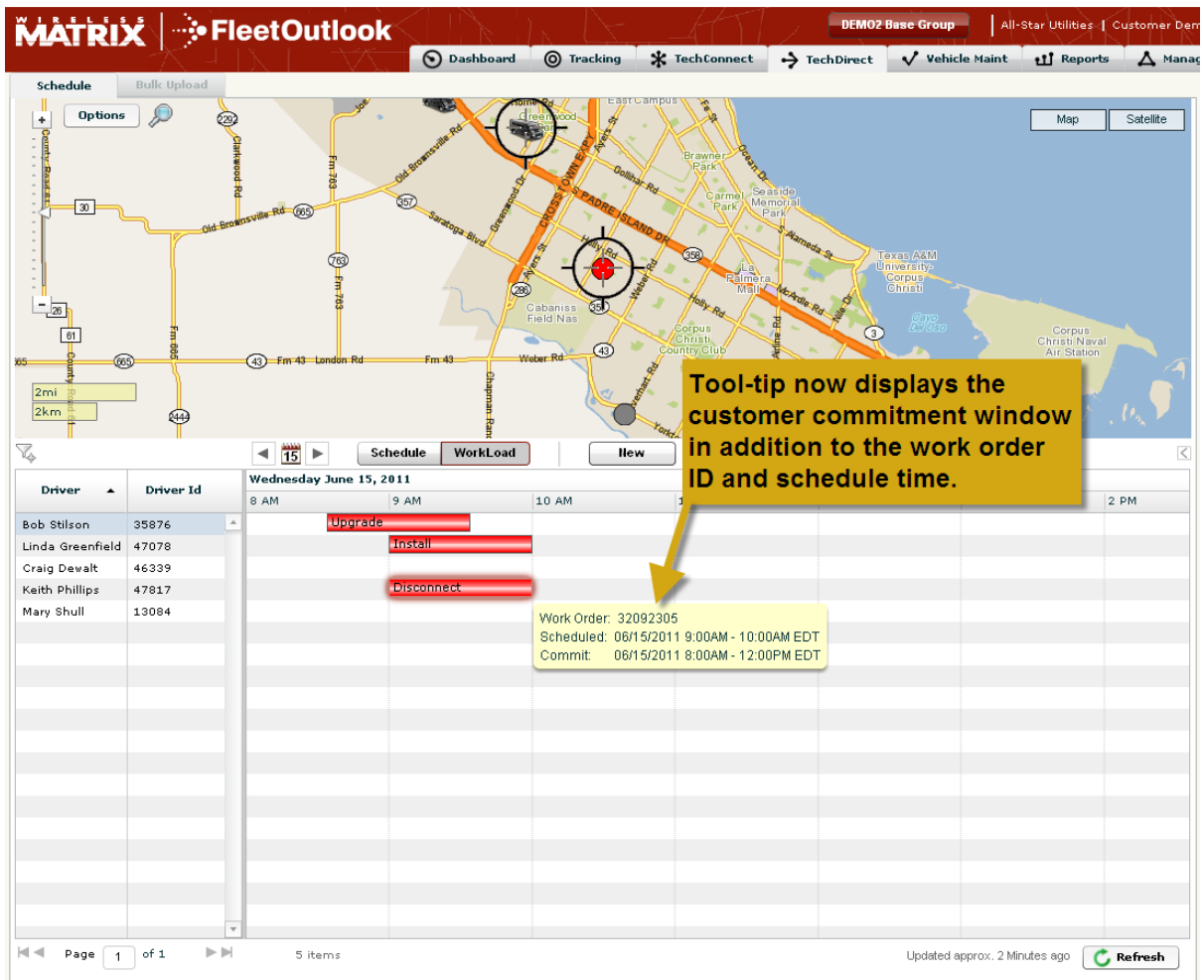
Drag and Drop

Users can now drag and drop work orders within TechDirect to (re)assign them to a driver or change the scheduled time. Specifically, users can drag an unassigned work order from the map in TechDirect to a driver on the Gantt chart to assign that work order to that driver. Users can also reassign a work order to another driver by simply dragging the work order from one driver to another on the Gantt chart. Finally, users can change the scheduled time of a work order by moving it to the desired time on the Gantt chart.

Note: This feature is not available for jobs that are received into FleetOutlook thru web services (from a Workforce Management System for example).

Re-open Jobs

This feature allows users to disregard a GPS arrival/departure timestamp and reset a job to incomplete. This is typically used when a driver arrives at a job, but then leaves the location because no one was home or the homeowner requests the driver return later.

Close Jobs

This feature allows users to close a job and mark it as complete when there is no valid GPS arrival timestamp for that job. This occurs when the driver stops too far away from the customer address to indicate arrival or in some cases when the address is not correctly defined for the work order. When closing a job the user can enter the time of arrival and departure manually for the job so it is displayed accurately on the Gantt chart.

Note: This feature is not available for jobs that are received into FleetOutlook thru web services (from a Workforce Management System for example).

New Filters

Two new filters are available in TechDirect that allow users to limit what is displayed on the map and Gantt chart. Users can now filter what is displayed so they see only a specific vehicle category or just active drivers. Note that an active driver is a driver that has driven more than one mile that day. To apply a filter, users need to click on the filter icon (funnel), select the desired filter criteria and click Apply.

Questions

Contact Wireless Matrix Customer Support at 866.456.7522
or customercare@wrx-us.com.

We are continuously improving the documentation and training we supply to our customers, but we need your help. Do you have any suggestions for what you would like to see in the future? If so, please send an email to Chris Martin and let us know the resources you need to be successful.