Welcome to the Fleet Complete
GF Training Series

GF Role Access and Responsibilities

This training will include the following topics to provide you with the information surrounding your role and job functions within Fleet Complete:

- ***Map***
  - *Live Access to Vehicles*
  - *Perform History Tracking*
  - *Search Vehicle Locations*
  - *Find Who Was At a Location*
- ***Reporting***
  - *Run Reports*
  - *View Reports*
  - *Schedule Reports*
- ***Settings***
 - *Assign Drivers*
  - *View Hierarchy*

Note: Screenshots throughout this training may change as system enhancements and developments take place through the life of the system.

# Let's review the enhancements on the Map module

Map Module: Clustered Assets

- ➢ **Cluster Assets** feature is now enabled by default for FC Hub users.

- ➢ This allows to reduce visual clutter on the map and provides a better view by grouping together assets in the same location.

- ➢ Clustered Assets on the tracking map are represented by the **Number** of Assets in the cluster. For e.g.: 6

- ➢ Follow the steps below to view an **Asset Cluster:**

    1. On the map screen, hover over the circled number to view the list of assets within the cluster

    2. From the list displayed, select an asset to review more details, as necessary
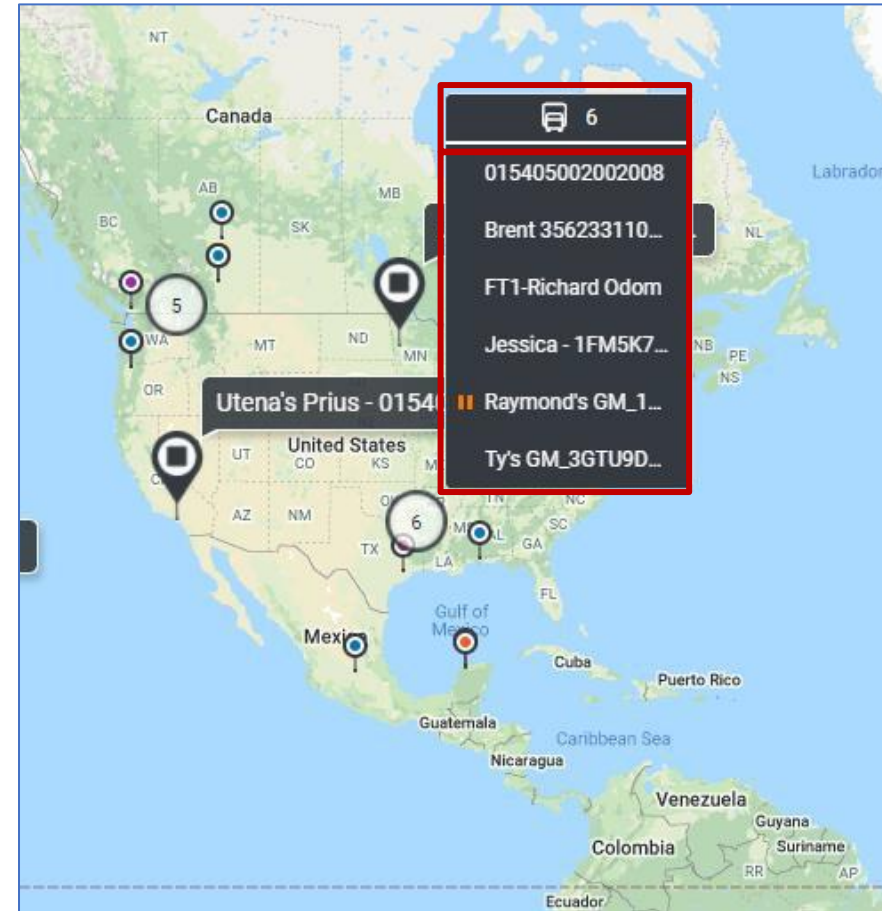
Map Module: Asset's view on the Map

➢ With this improvement, When a user hovers over the asset list on the left-hand side without picking a particular asset, the asset will be **highlighted** in a cluster on the Map Area with blue borders around it.

➢ Please follow the steps below to access the "Map module" and review the new changes:

1. Log in to **FC Hub**

2. From the **Navigation Panel** on the left-hand side, click the **Map module**(Generally selected by default)

3. Click any asset from the "**Asset List**" on the left-hand side

4. Review the asset on the "**Map Area**" on the right-hand side

5. Alternatively, hover the "**Asset List**" on the left-hand side

6. Review the **asset in a cluster** on the right-hand side on the map Area
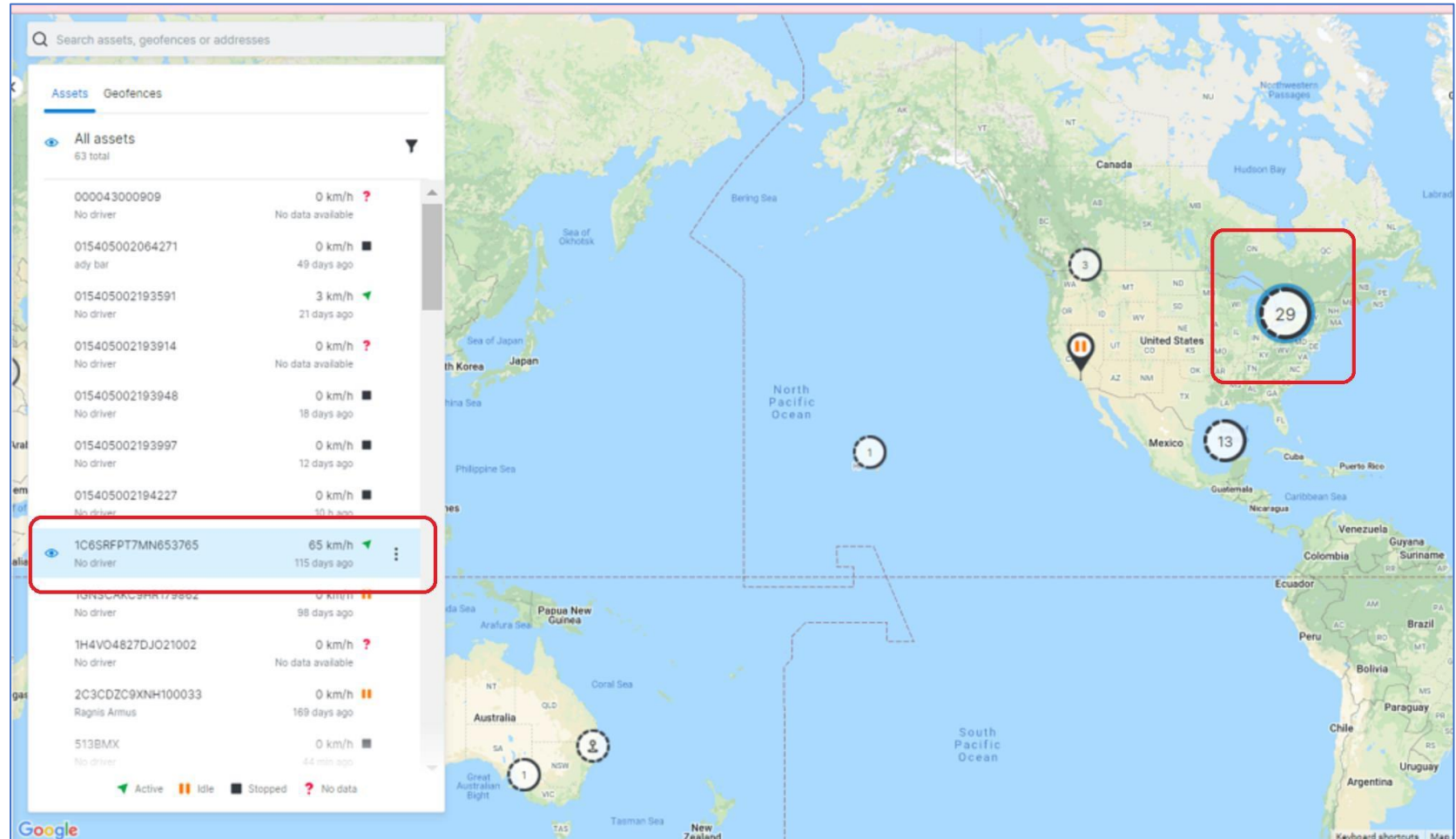
Map Module: Asset's details on the Map

➤ *FC Hub will show all **assets highlighted with blue borders around it on the "Map Area"** on the right-hand side when an asset is selected from the list.*

   ▪ *This is helpful when users need to distinguish between many **vehicles located close to each other**, for example, in a parking lot.*

➤ *This aims to **attain precise visibility** in finding the correct asset on the "Map Area".*

➤ *Previously, users could view assets on the map area, but the system did not highlight the selected assets.*
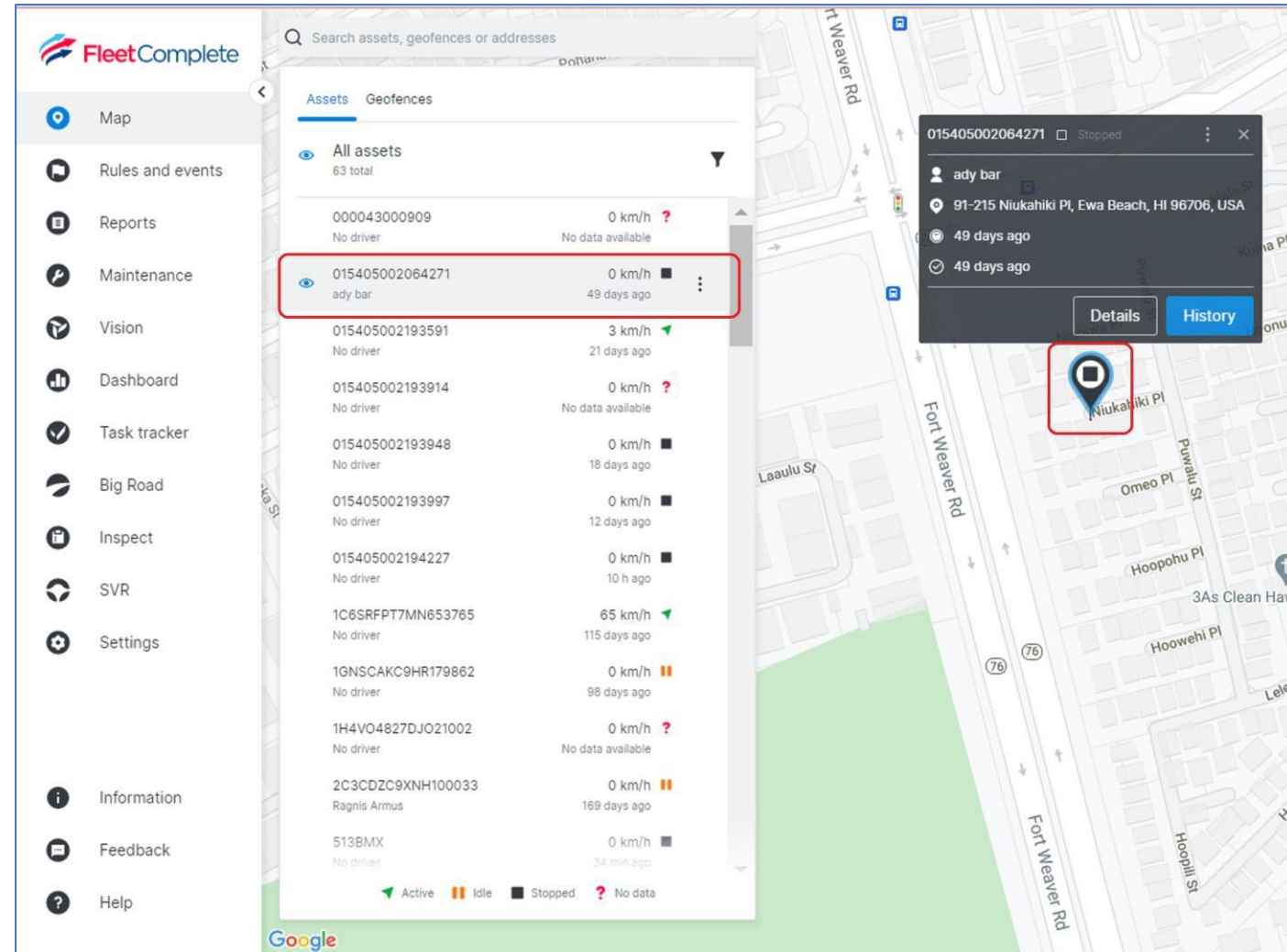
Map Module: Visibility Options
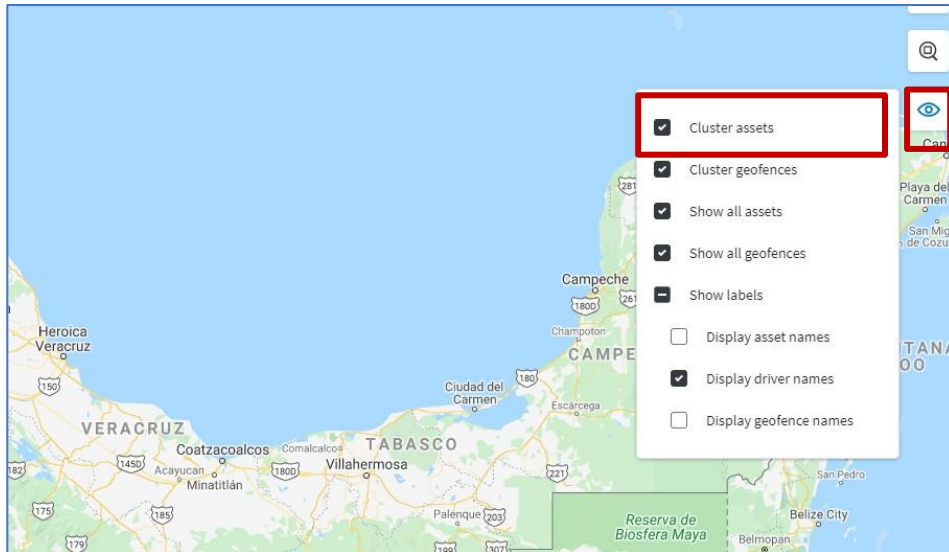
➢ *There are multiple ways to display the data on the map. Vehicles and Geofences can be clustered, or shown individually. Also, the way the vehicles name is listed can be changed to show the vehicle ID, Driver name or both.*

➢ *Follow the steps below to view the **Map Visibility options** feature, as necessary:*

1. *On the map screen, click the **Eye** icon on the top right-hand corner*

2. *Select or deselect the checkbox next to **Options** to turn the visibility on or off, based on your preference.*

Map Module: Trip History
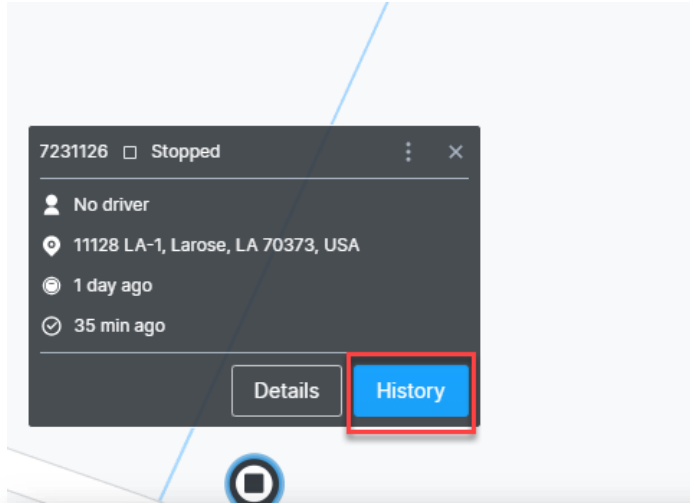
- ➢ **Trip History** *is now displayed based on Asset and Fleet Trackers in a Fleet. The data is broken into Trips, however the Trackpoints or Breadcrumb Trail can also be displayed for each individual ping from the device.*

- ➢ *If an Organization has both Asset & Fleet Trackers, both the* **Trips** *and* **Trackpoints** *tabs will display.*

- ➢ *Follow the steps below to review a Fleet/Asset Tracker History:*
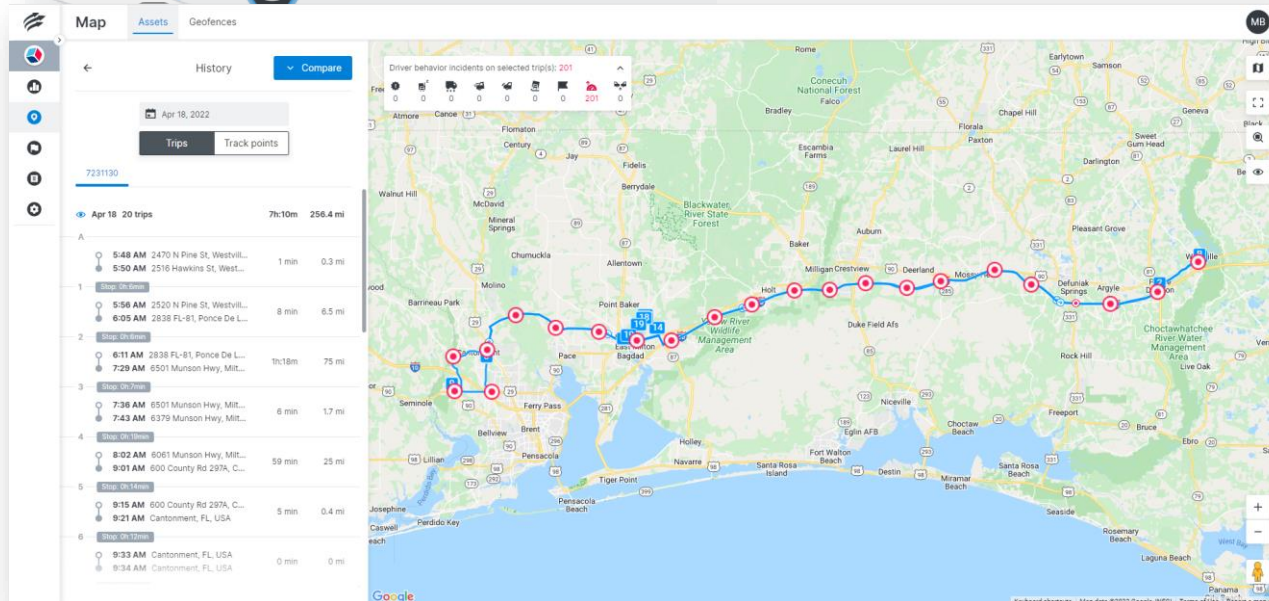
    1. *From the map, select an Asset*

    2. *Click the* **History** *button*

Map Module: Vehicle Details
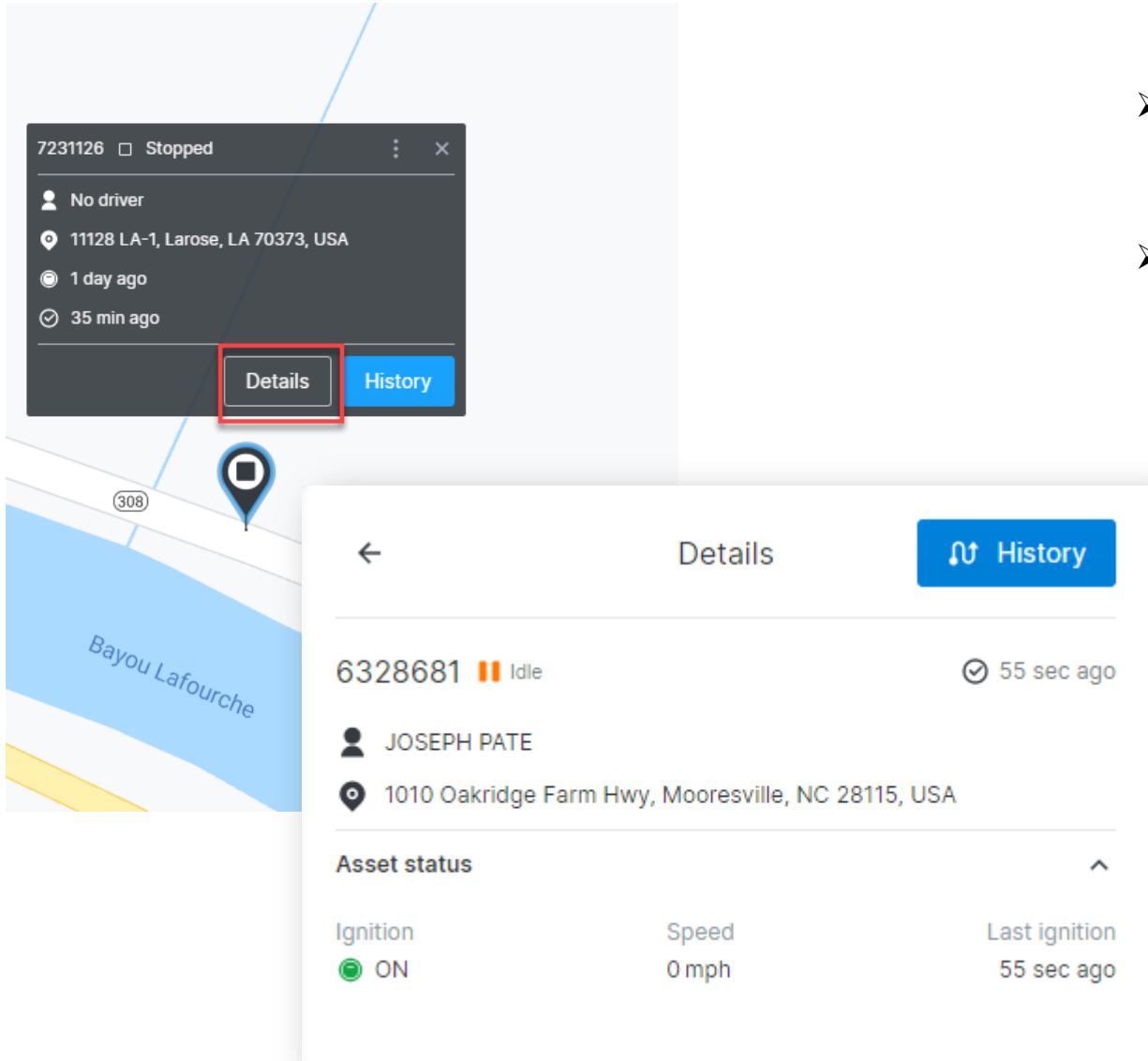
- The Vehicle Details provides a high-level summary of the asset showing Vehicle name, address, driver, and most current status, based on ignition and speed.

- To view the history of the vehicle, follow the steps below to review a Fleet/Asset Tracker History:

    1. From the map, select an Asset Tracker

    2. Click the **Details** button

Map Module: Who was here?

➢ FC Hub users will now be able to launch **"Who was here?"** from any given point on the Map, so that they can investigate vehicle interaction with the chosen point.

➢ It helps the Fleet manager find out the location of any vehicles present at the given point/address at a given time to understand if the vehicle/ driver did the assigned job.

  ▪ **"Nearby assets"** provide information about the real-time position: which asset is the closest to the location right now.

  ▪ **"Who was here"** provide data about history, which asset was in the location at a selected time.

Note: "Who was here?" can be triggered by right-clicking anywhere on the Map or from the Geofence menu (either in the geofence list on the right or from the Quick view card).

Map Module: Who was here? Results

- The **Who was here layer** display the results of a vehicle in a chosen area. By default, today's date and radius of **25** meters are selected.

- On the top, users can view the number of results as in the picture shown; nine results are displayed

- In the **Search bar** on the top, users can search the asset or the driver

- The chosen point/area is shown under the **location section**

- Users can also choose the **date and time from the calendar icon** displayed to view the history of the assets on the selected point

- Users can also **define the radius** of the search by scrolling the bar towards the right and left

- If need be, users can click the **"Reset"** button to enter the search parameters from scratch.

Left-hand side: Search parameters

Right-hand side: Search results

- After everything is set, Users should click on the **Search** button at the bottom to display the results on the right-hand side and the number of the results on the top.

- The results displayed in the grid are:
  - **Asset name**
  - **Timestamp and**
  - **Driver**

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Let's review the enhancements on the Dashboard module

Dashboard Module: Overview

- *The dashboard will open upon loading FC Hub and will contain important metrics and KPIs associated to your Fleet.*

- *The data will be broken down into high-level numbers or graphs to display counts, totals, trends and percentages.*

- *The dashboard can be filtered to a specific timeframe, as well as by Hierarchy level to view the individual levels KPIs.*

- *By hovering over the graphs, text will appear explaining what each color represents with a brief description.*
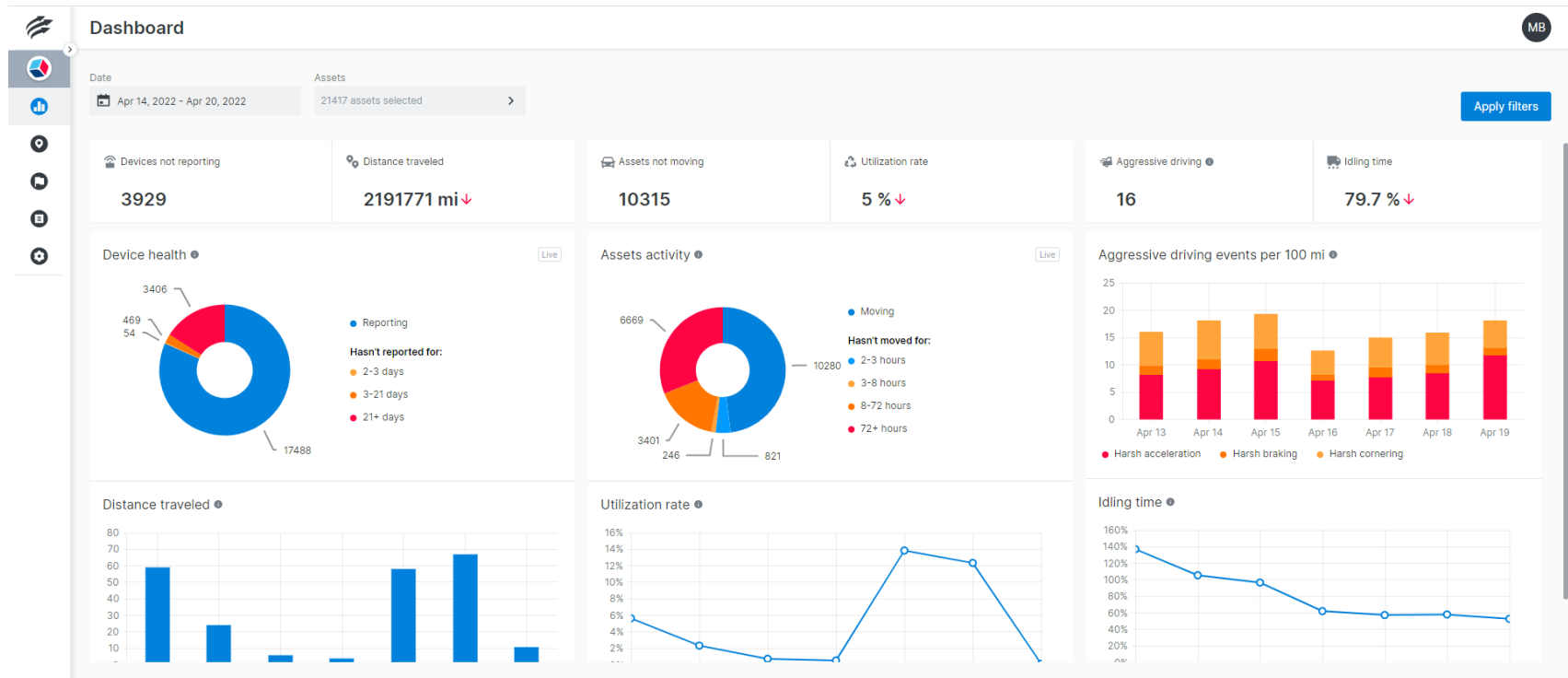
Dashboard Module: Filtering

- To apply date-based filters to the dashboard, you would select the **Date Range**.

- To apply vehicle or hierarchy filters to the dashboard, you would select the **Assets** module, then select the units or the hierarchy node.

- Click **Apply Filters** once the filters are set to update the dashboard.

Let's review Enhancements made to the Reports module

Report Module: All Reports

➤ *Report module's purpose is to allow users to explore all the data received from their assets along with contextual information.*

➤ *This data is organized within logical categories and displayed in a tabular format for easy analysis & discoverability.*

➤ *Report data can be analyzed within module and can be saved for frequent reviews*

➤ *It also can be exported for sharing or importing into other systems.*

➤ *Report module has the following tabs:*
  - ***All reports***
  - ***Open reports***
  - ***Schedule***

➤ ***'All Reports'*** *tab is a dedicated place to explore all the reports available with Descriptions and ability to **search** by Report Name & Description. The tab also allows users to mark frequently used reports as **'Starred'** and access them in Starred Reports sub tab.*

➤ *All reports tab has following types of reports in FC Hub at the movement*
  - ***Trips reports***
  - ***Geofences interaction report***
  - ***Activity report***
  - ***Device data log***
  - ***More..***
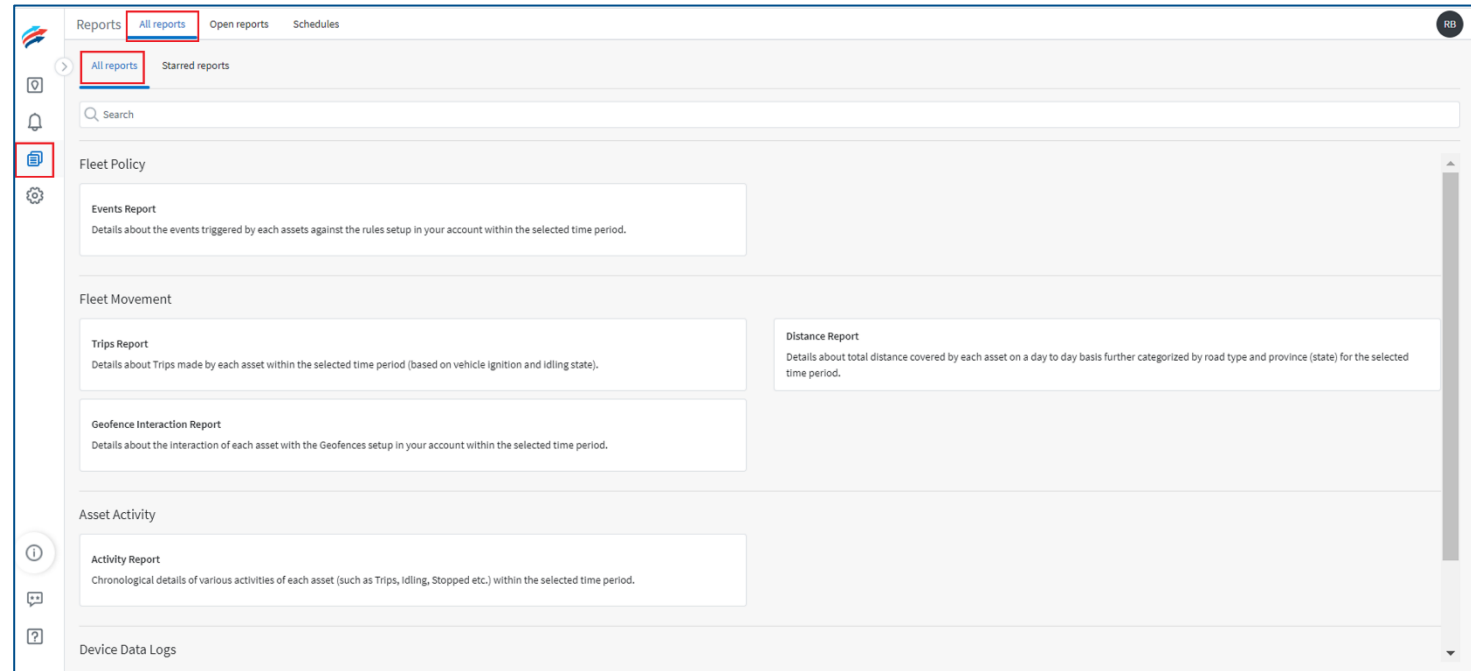
Report Module: Create a Report

➢ *User can hover any report option and click to generate a report.*

➢ *A report generate modal allows users to select report filters such as Date Range, Time Range and Asset Selection.*

Note: The Group Selection mechanism is a just a means to further filter down the list of Assets available in the Asset Selection dropdown based on Asset hierarchy setup in system. All Groups are selected by default and user can skip Group selection if they are comfortable selecting assets directly from the Asset Selection modal.

Trips Report   ✕

Please select date range and report filters to generate a report
Period

📅 Feb 28, 2021 - Mar 7, 2021   ⌄

Group selection

Select group/s   ⌄

Asset

Select asset/s   ⌄

Cancel   **Generate**

Report Module: Open Report

- A multi-tabbed report browsing experience is supported in FC Hub .

- Users can keep multiple reports open at same time (even of same type).

- All the open Report tabs are housed under the **'Open Reports'** tab even if user moves to another module within FC Hub and as far as user doesn't close the browser session.

- Once a Report is open, user can review number of records found and revise the 'Current Report Filters' to bring in more/less records

- All the records found after generation are shown in a grid format. Users can Sort & Filter rows in the grid by clicking on option on top of each column.

- While a report may have many columns available, it is advised to select only a few are shown in the UI by default for easy readability.

- Users can always export all columns if they wish to or use the column Selection & Reordering features on top right of grid to bring out the data points that matter to them the most.

Reports Module: Scheduling Reports

- FC Hub users will now benefit from **scheduling reports** as necessary.

- Scheduling reports is a convenient option to set up **reporting routines as per the organization's needs.**

- To set up a new scheduled report, follow these steps below:

  1. Log in to **FC Hub**

  2. From the **Navigation Panel** on the left-hand side**,** click the **Reports module**

  3. From the **reports home screen**, run the report, as necessary

  4. After the information has been generated **on the Open reports screen,** click the **Schedule** button on the top right corner of the screen

➢ *Let's continue to set up a new scheduled report, with these steps below:*

1. *The **subscription** of the scheduled reports for any user is based on the access levels of the creator of the report.*

2. *Under the **recipients' section**, share the scheduled report with other platform users by selecting their names. Schedule creator has been selected by default*

3. *After filling all the above fields, click the **Save** button on the bottom, the selected report will be automatically generated and sent to all the subscribers based on a defined schedule*

Let's review Enhancements made to the Settings module

Settings Module: Asset Driver Assignment

➢ The Asset tab under Settings allows the user to view all of the vehicles assigned to them, as well as display information associated to the unit.

➢ To assign a driver to an asset, you would navigate to the following:

➢Click the **Settings** icon

1. Under the **Assets** section, select the asset by clicking on the row.

2. The right-hand window will appear the vehicle details. Under the **Default Driver** section, use the drop-down to select

Settings Module: Hierarchy

➢ The Groups tab allows the user to view their hierarchy and vehicles, users and geofences under their assignment. This is helpful to view to ensure all items needed are available for your given access and responsibility.

➢ Follow the steps below to access the "Groups tab" in FC Hub to view the Hierarchy:

1. Log in to *FC Hub*

2. From the *navigation Panel* on left hand side*,* Click the *Settings module*

3. Click the *Groups* tab on the top
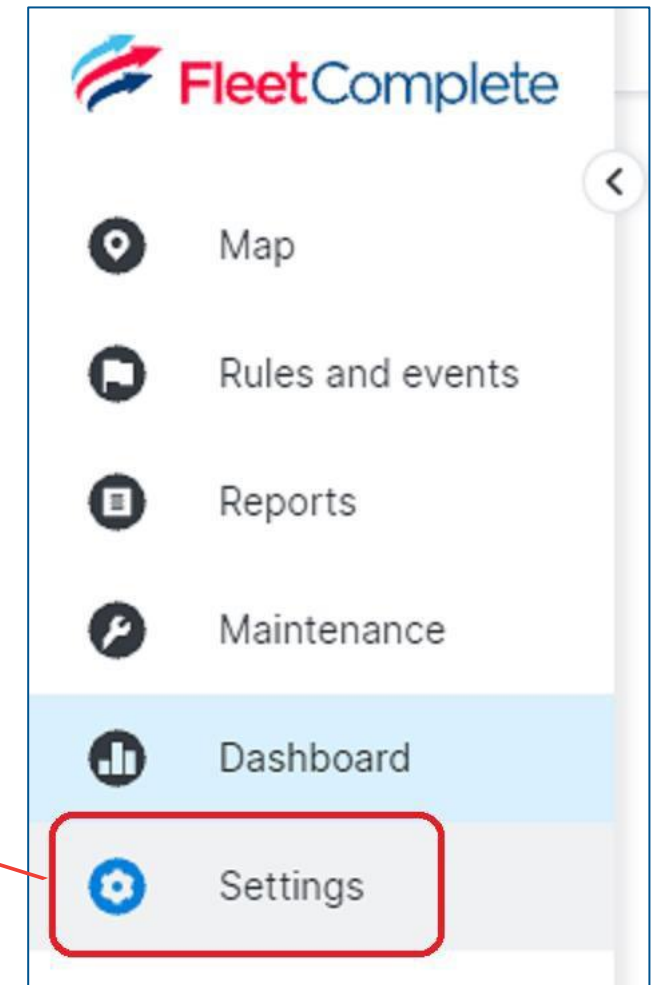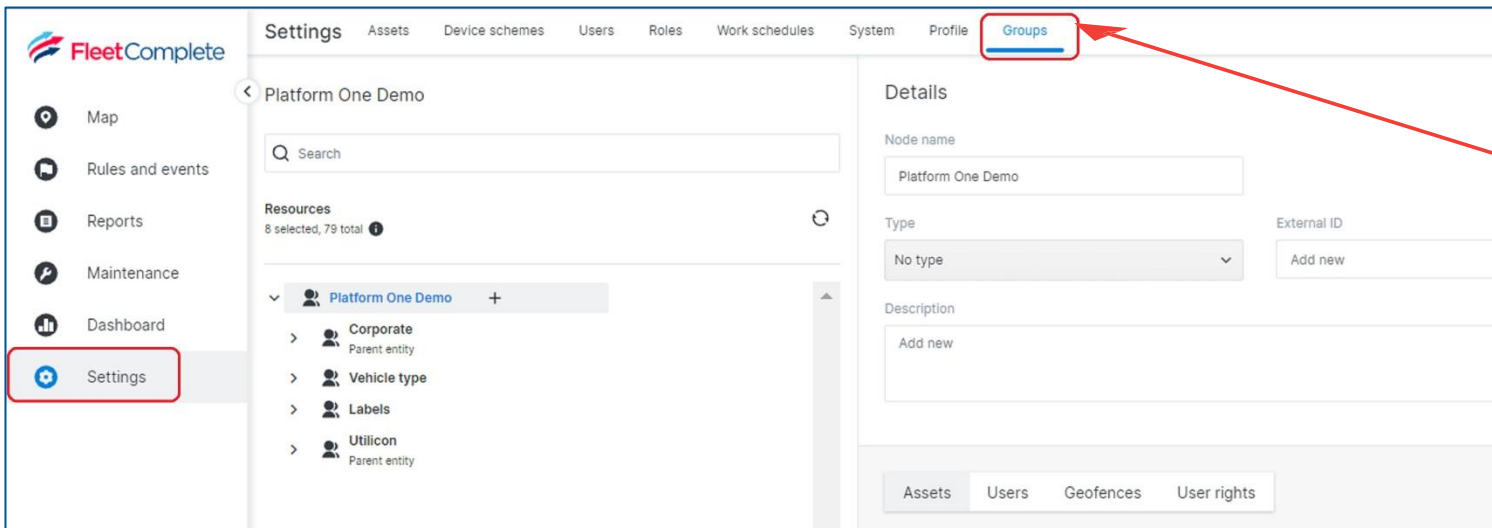
Settings Module: Quiz Question #1

1. Drivers are assigned to a vehicle under the Map Module by selecting the vehicle on the screen?

   1. True
   2. False (correct)

   Answer: Drivers are assigned to the asset record under the Settings Module.

Settings Module: Quiz Question #2

1. The Hierarchy is where you can view the vehicles under your view/node?

    1. True (correct)
    2. False

    Answer: The Hierarchy contains the list of vehicles assigned to your level within Fleet Complete.

Reports Module: Quiz Question #1

1. Reports can be scheduled to automatically send to an e-mail address?
    1. True (correct)
    2. False

    Answer: You can assign yourself and other e-mail addresses to any scheduled report.

1. Reports can only be viewed within the report module of the system?
   1. True
   2. False (correct)

   Answer: All reports can be exported to Excel, CSV or PDF format.

Map Module: Quiz Question #1

1. Clustered vehicles and geofences on the map will show as a circle with the number of items inside the cluster?
   1. True (correct)
   2. False

   Answer: Vehicles and Geofences will show within the cluster and will break apart into individual items the more you zoom into the map.

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Dashboard Module: Quiz Question #1

1. The Dashboard is where I run and schedule reports for review?
    1. True
    2. False (correct)

    Answer: The Dashboard is a filterable visualization of KPIs and Metrics to provide a high-level view of how the fleet is performing.

Map Module: Quiz Question #2

1. The breadcrumb trail is the only way to determine if a vehicle was at an address?
    1. True
    2. False (correct)

    Answer: You can use the "Who was here?" function to locate any vehicle that was at or within a specified location.

Conclusion

- Depending on your role within your Region, you may have more access or responsibility granted by your Manager. The following areas will be available to you for further training and reference, as needed.

- **BirdDog LMS Training**
  - Supervisor and Limited Admin training

- **Fleet Complete HUB Training Portal**
  - QRC (Quick Reference Cards)
  - How-To's
  - Training Videos
  - Tips & Tricks

- **Fleet Complete 1LS Support**
  - Phone: 1-888-672-6083
  - E-Mail: utilservfleetsupport@fleetcomplete.com

- **Utilserv AVMS Support:**
  - E-Mail: avms@utilservllc.com