

FleetLocate Enhanced UI

User Guide

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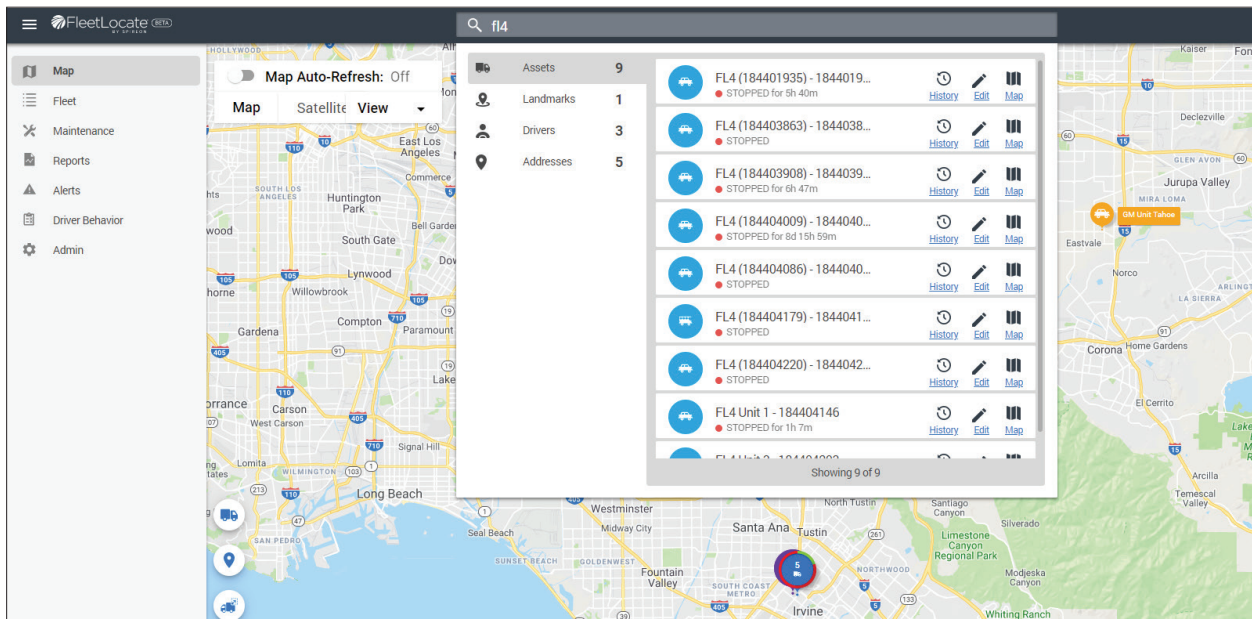
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The FleetLocate Periscope mobile manager application user guide can be found [here](#).

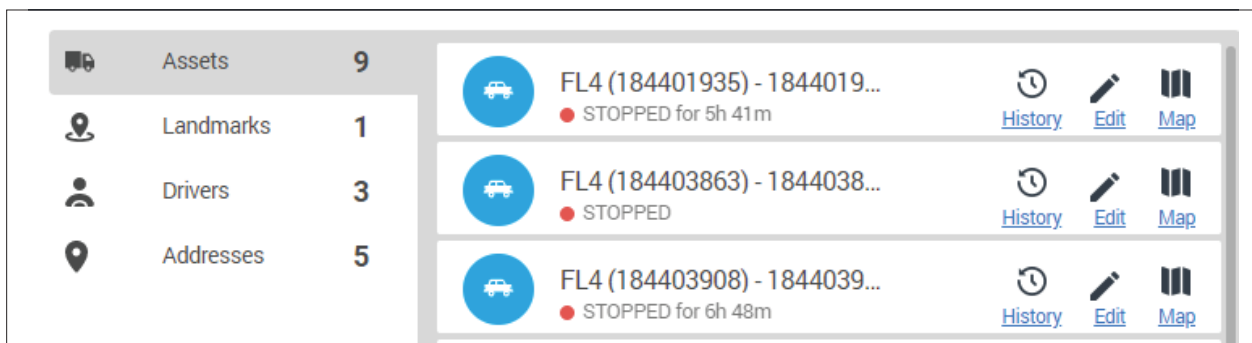
Search

A universal search bar is available in the header of the FleetLocate Enhanced UI. This search bar allows you to search for any Asset, Landmark, Driver, or Address location in the account. Please enter at least three characters to perform a search.



Each search category will provide links within the results to allow you to easily edit or see more info on the specific item that was of interest.

“Assets” Search Result Options

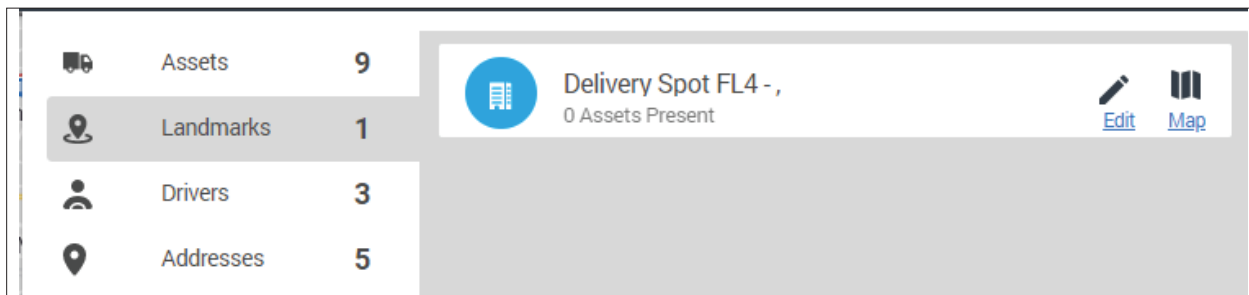


History - Brings you to the Assets trip/ events history on the map.

Edit - Provides an edit view of this Asset.

Map - Provides the overview details of this Asset on the map.

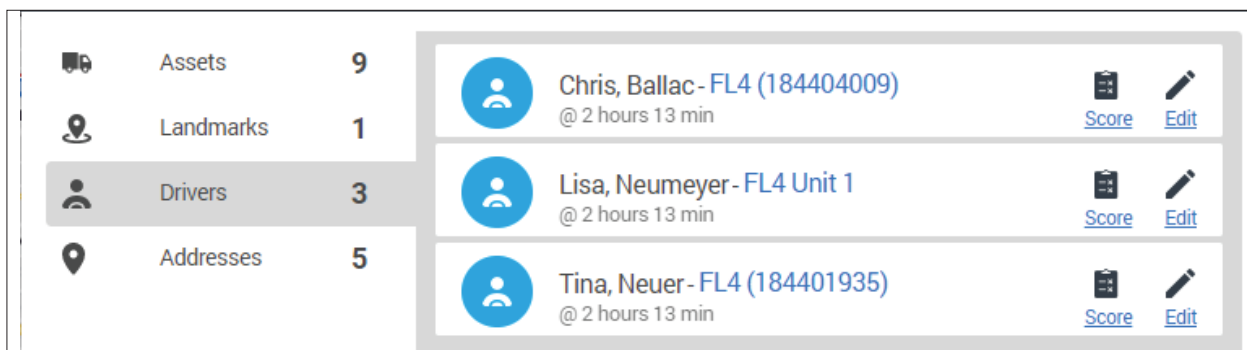
“Landmarks” Search Result Options



Edit - Provides an edit view of this Landmark.

Map - Provides the overview details of this Landmark on the map.

“Drivers” Search Result Options

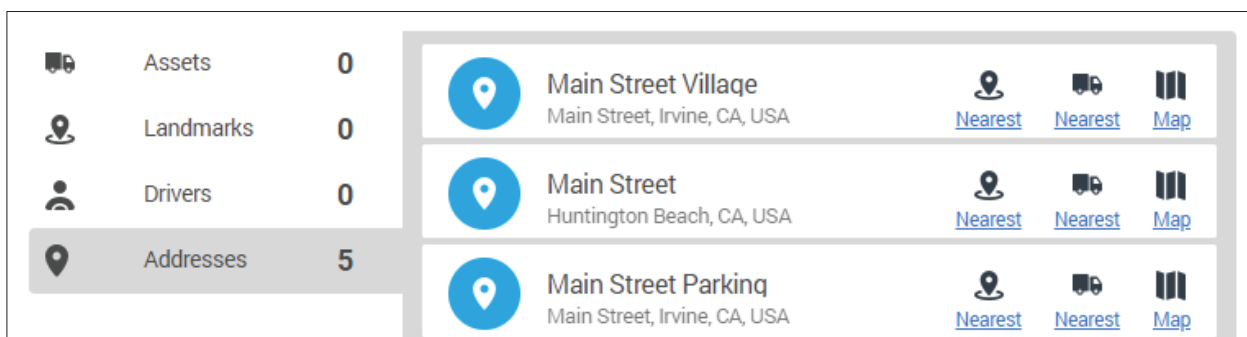


Device link (in blue) next to Driver name - Provides the overview details of the asset the driver is currently assigned to on the map.

Score - Provides a view of the individual scorecard for this driver

Edit - Provides an edit view of this Driver.

“Addresses” Search Result Options

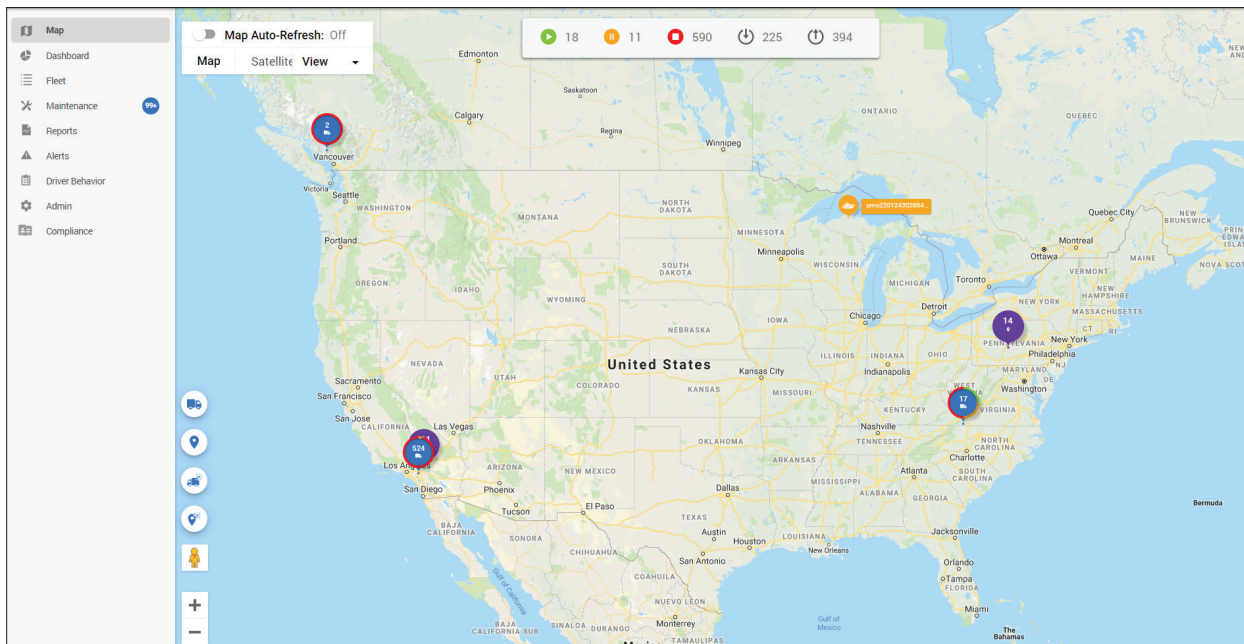


Nearest Landmark - Will provide a route to the nearest landmark from the searched address location shown on the map.

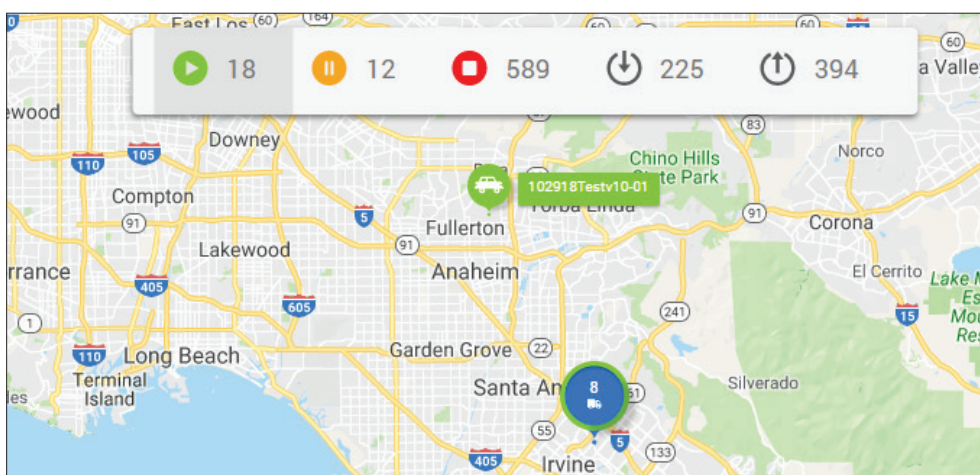
Nearest Asset - Will provide a route to the nearest asset from the searched address location shown on the map.

Map - Shows this Address location on the map.

MAP



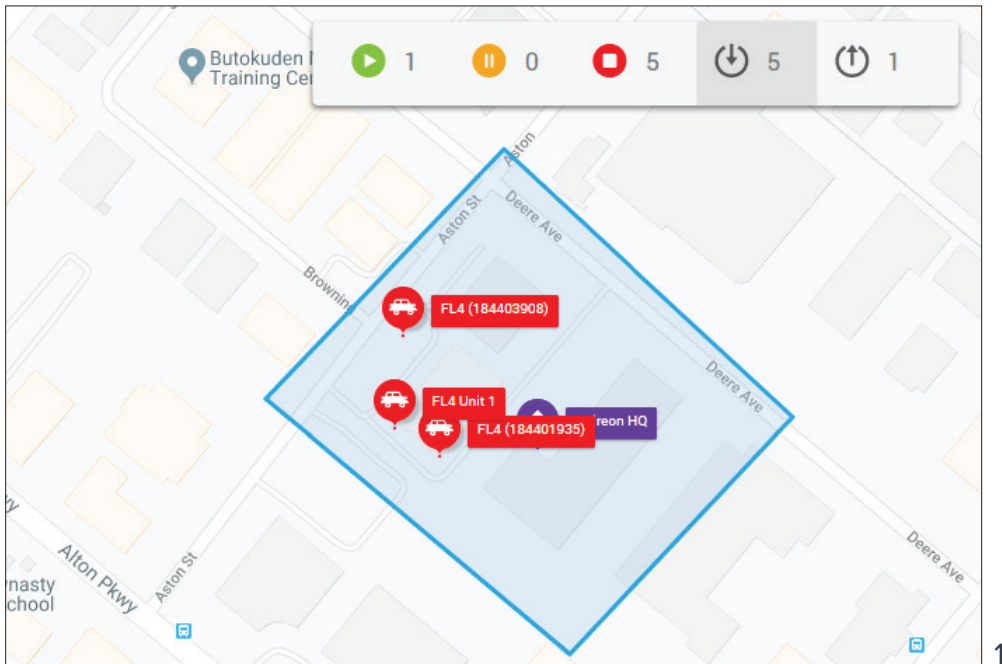
The map page can be accessed by clicking the “Map” tab on the left at any time. On the map, the following can be applied.



Sort Assets by Moving, Idle and Stopped status by clicking on one or multiple icons in the header.

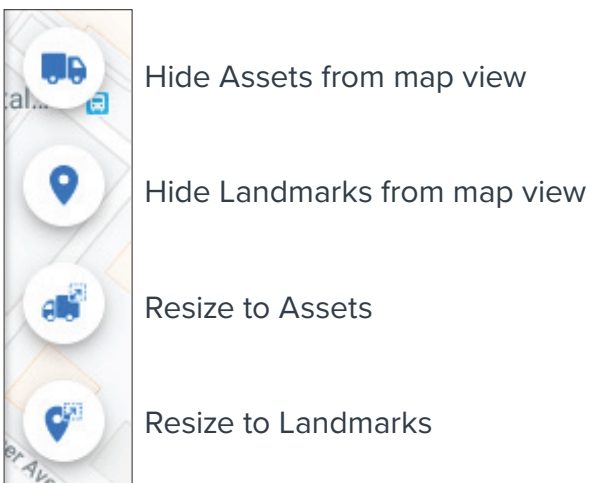
Example: Clicking on the green moving icon will show only currently moving assets on the map.

Sort Assets by those who are inside vs outside of a Landmark.



Example: Clicking inside a Landmark symbol will show the assets that are currently within that Landmark.

A menu on the bottom right part of the map allows for the following options.



A menu on the top left of the map allows for the following options.

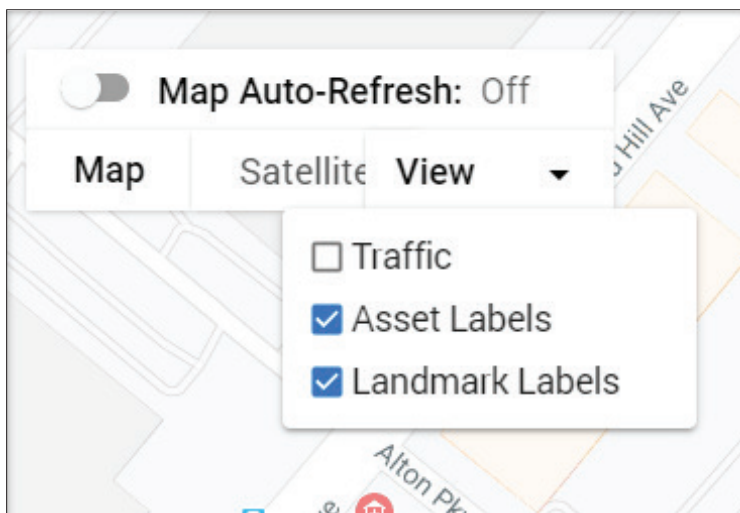
Turn Map refresh off/on

- When turned on the refresh will occur every 30 seconds

When clicking on the “View” drop down the following options can be enabled.

Show/hide traffic on map

- Show/hide asset labels on map
- Show/hide landmark labels on map



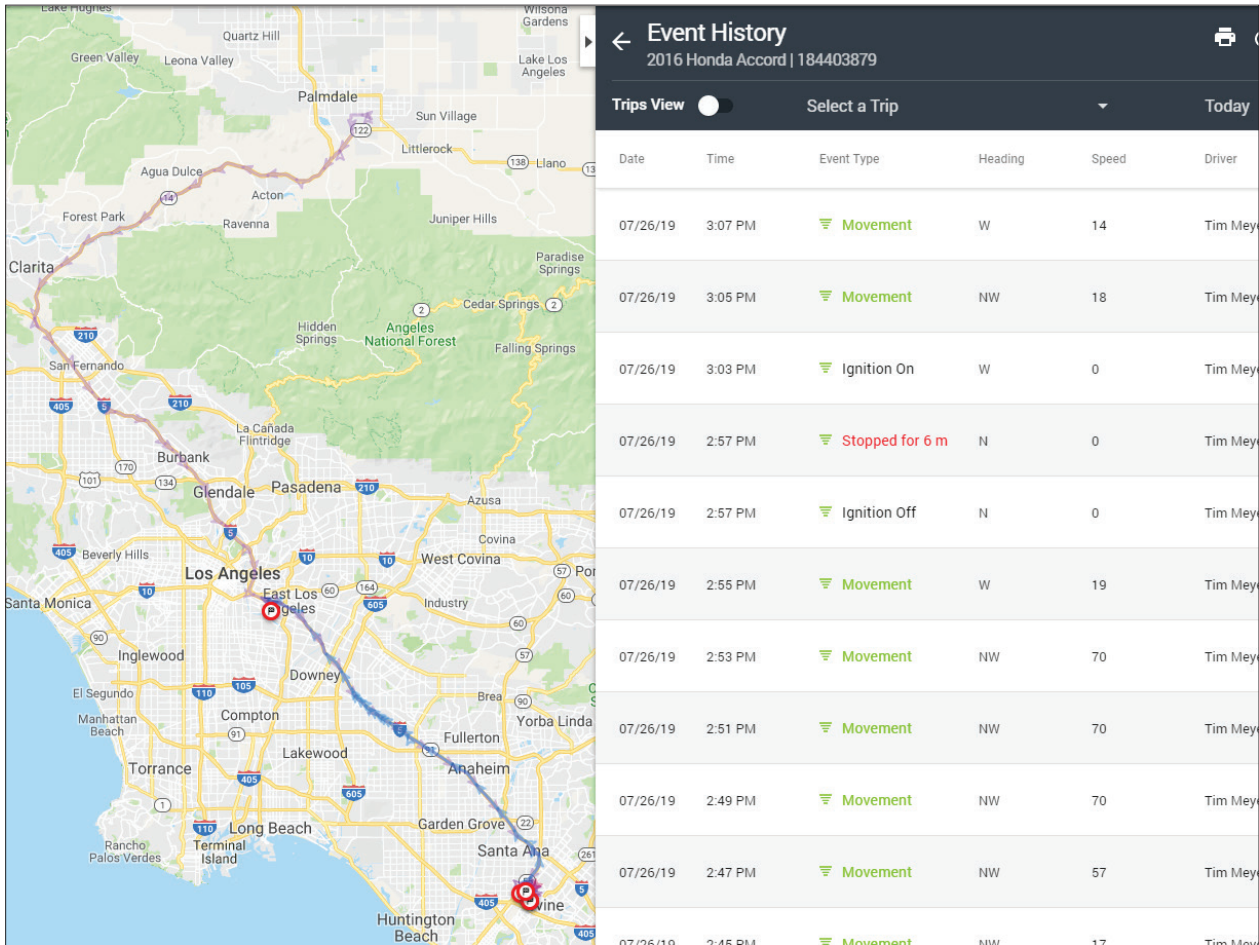
ASSET MAP DETAILS

When clicking on any of the assets on the map, the detail view of the respective asset will be visible on the map. From here, additional actions can be taken.

Show History (Asset Trip View)

Brings you to the Assets trip/events history on the map. You will have the option to switch in between Trips and Events view by switching the “Trips View” toggle button in the header on or off.

Detail Events View



Event History
2016 Honda Accord | 184403879

Trips View Select a Trip Today

Date	Time	Event Type	Heading	Speed	Driver
07/26/19	3:07 PM	Movement	W	14	Tim Mey
07/26/19	3:05 PM	Movement	NW	18	Tim Mey
07/26/19	3:03 PM	Ignition On	W	0	Tim Mey
07/26/19	2:57 PM	Stopped for 6 m	N	0	Tim Mey
07/26/19	2:57 PM	Ignition Off	N	0	Tim Mey
07/26/19	2:55 PM	Movement	W	19	Tim Mey
07/26/19	2:53 PM	Movement	NW	70	Tim Mey
07/26/19	2:51 PM	Movement	NW	70	Tim Mey
07/26/19	2:49 PM	Movement	NW	70	Tim Mey
07/26/19	2:47 PM	Movement	NW	57	Tim Mey
07/26/19	2:45 PM	Movement	NW	17	Tim Mey

Trips View

Event History
2016 Honda Accord | 184403879

Trips View Today ▾

- Jul 26, 2019 03:03 PM
In Progress
- Jul 26, 2019 02:57 PM
6 m Stopped
- Jul 26, 2019 02:03 PM
 53 m | **53 m Moving** | 0 m Idle | 31 mi | 8 Alerts
- Jul 26, 2019 01:57 PM
6 m Stopped
- Jul 26, 2019 01:52 PM
 5 m | **5 m Moving** | 0 m Idle | 1 mi | 1 Alerts

3:03 PM ● 1094 S Hicks Ave, East Los Angeles, CA 90023

2:57 PM ● 3960 Dennison St, East Los Angeles, CA 90023

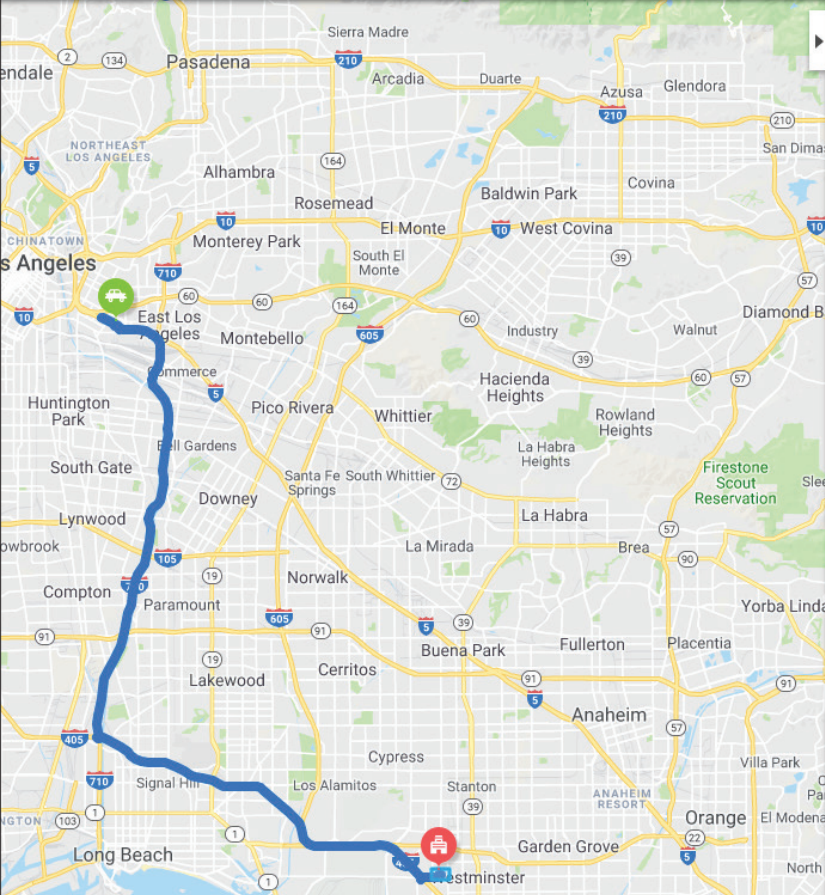
2:03 PM ● 2673 Pullman St, Santa Ana, CA 92705
 2:57 PM ● 3960 Dennison St, East Los Angeles, CA 90023

1:57 PM ● 2673 Pullman St, Santa Ana, CA 92705


1:52 PM ● 16802 Aston, Irvine, CA 92606
 1:57 PM ● 2673 Pullman St, Santa Ana, CA 92705

Nearest Landmark

Provides a route to the nearest landmark from the current asset location shown on the map.




← Nearest Landmark



2016 Honda Accord
Moving for 1m
I-5, Los Angeles, 90023

18 mph
NW ↙



24h fitness

0 Assets

Directions Details

36 mins (30.1 mi)

1. Head **northwest** on **I-5 N**
1 min

2. Take exit **133** for **Grande Vista Ave**
1 min

3. Turn **right** onto **Atlantic St**
2 mins

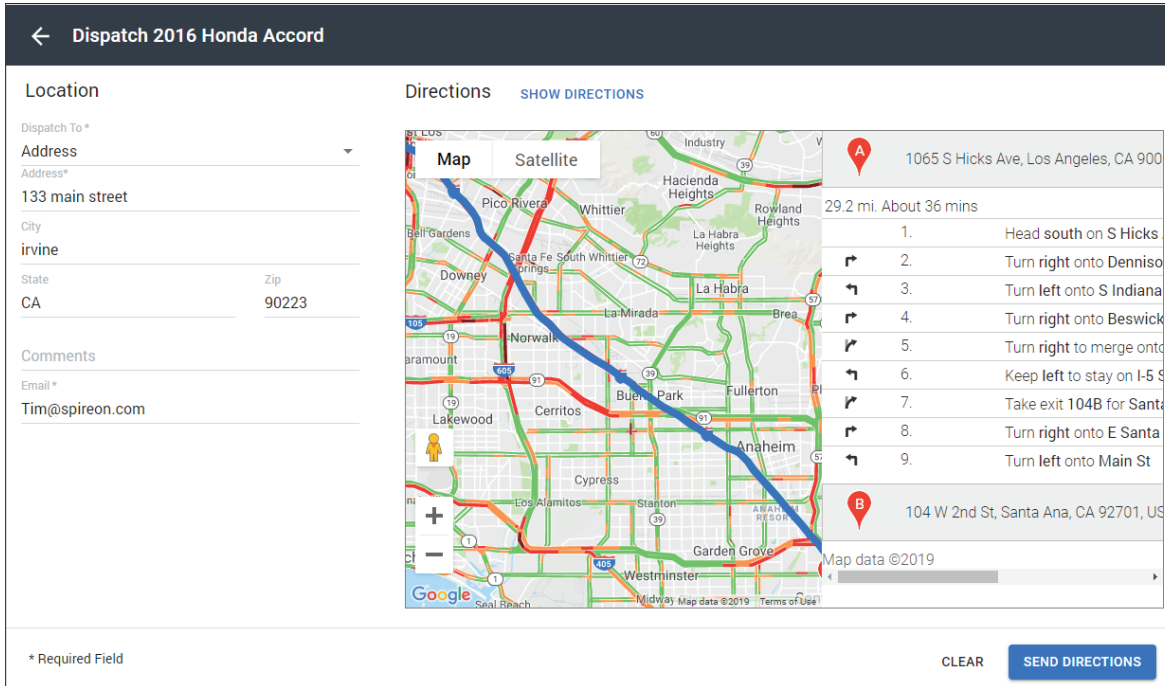
4. Turn **right** onto **Esperanza St**
1 min

5. Turn **left** onto **Beswick St**
1 min

6. Turn **left** to merge onto **I-5 S**
2 mins

Dispatch Vehicle

Allows for directions to be emailed to the driver.



The screenshot shows a mobile application interface for dispatching a vehicle. At the top, it says "Dispatch 2016 Honda Accord". Below this, there are two main sections: "Location" and "Directions".

Location Section:

- Dispatch To * (Dropdown)
- Address* (Text input): 133 main street
- City (Text input): irvine
- State (Text input): CA
- Zip (Text input): 90223
- Comments (Text area)
- Email* (Text input): Tim@spireon.com

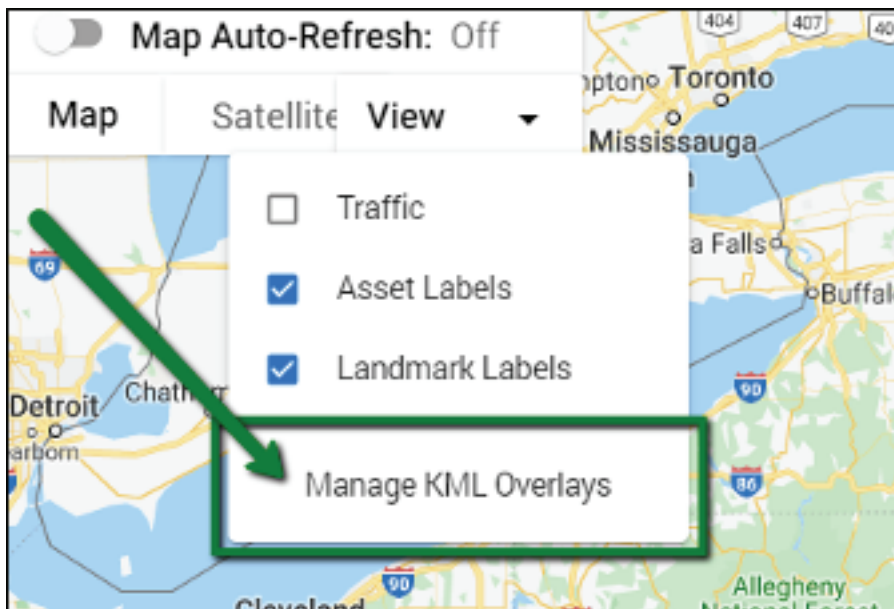
Directions Section:

- Directions (Text) with a "SHOW DIRECTIONS" link.
- A map showing a route from point A to point B.
- Point A: 1065 S Hicks Ave, Los Angeles, CA 900
- Point B: 104 W 2nd St, Santa Ana, CA 92701, US
- Distance: 29.2 mi. About 36 mins
- A list of 9 numbered directions:
 1. Head south on S Hicks
 2. Turn right onto Denniso
 3. Turn left onto S Indiana
 4. Turn right onto Beswick
 5. Turn right to merge onto
 6. Keep left to stay on I-5 S
 7. Take exit 104B for Santa
 8. Turn right onto E Santa
 9. Turn left onto Main St
- Map data ©2019
- Buttons: CLEAR and SEND DIRECTIONS

* Required Field

KML Overlays

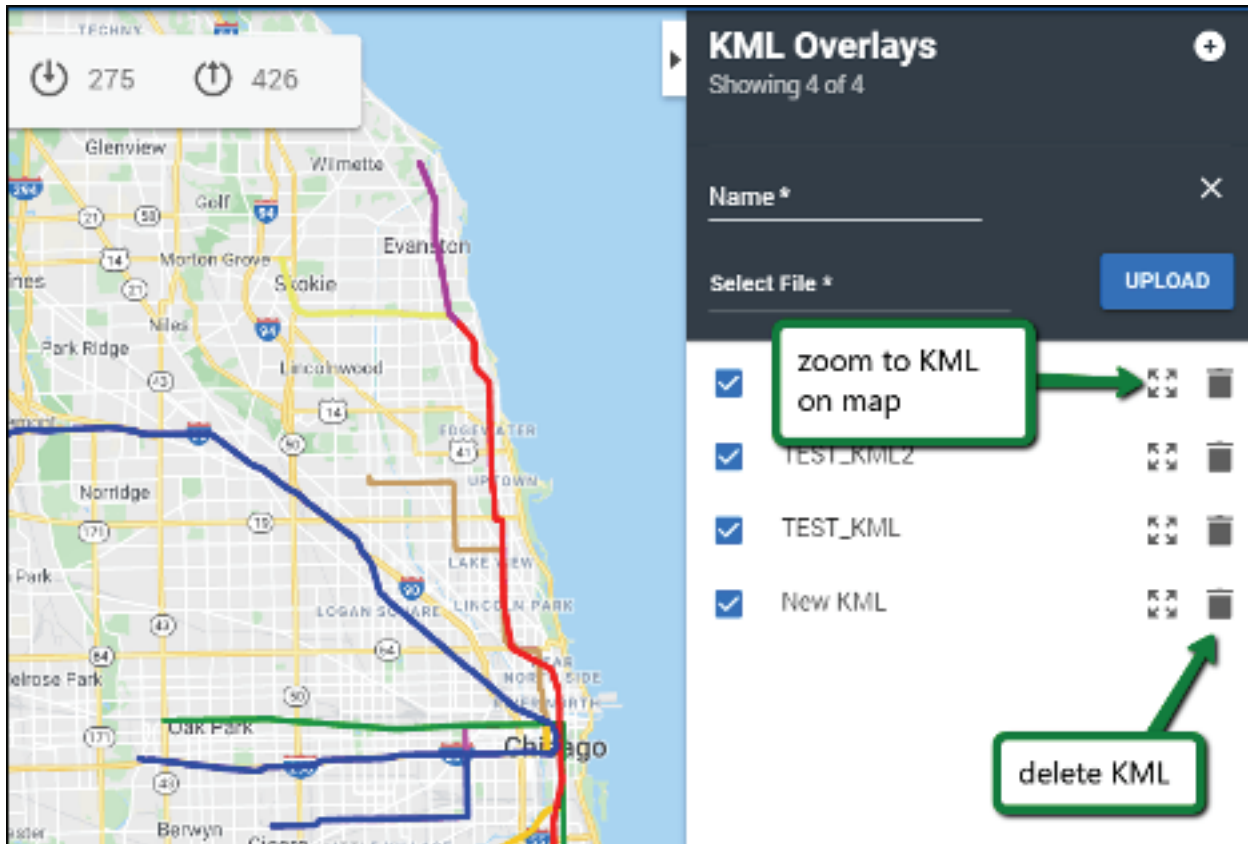
To add a new KML file to the Enhanced UI simply click on the map "View" drop down and click on the "Manage KML Overlays" button.



The screenshot shows a map interface with a "Map Auto-Refresh: Off" toggle at the top. Below the toggle are three map view options: "Map", "Satellite", and "View" (with a dropdown arrow). A dropdown menu is open from the "View" button, showing the following options:

- Traffic
- Asset Labels
- Landmark Labels
- Manage KML Overlays** (highlighted with a green box and a green arrow pointing to it)

From here the right hand map panel will open up. You can now click on the zoom icon to view the KML location on the map, use the check box to turn the KML visibility on the map on or off and create or delete a KML overlay from here.



Edit Asset

Provides an edit view of this Asset.

← Edit Asset
DELETE
SAVE

INFO
UPDATES
ASSOCIATIONS
INPUTS
SAFETY
MAINTENANCE

Asset ID

Asset Name*
2016 Honda Accord

Asset Icon* Car Asset Type* Vehicle-Light Duty

Icon Color CLEAR Device Serial 184403879 CLEAR

Asset Basics

VIN* 324234234324444444 Year 2016

Make Honda Model Accord

Tracking Details

Initial Odometer	Initial Engine Hours	
0.0 Miles	0.0 Hours	
GPS Tracked Miles	Device Tracked Engine Hours	66.2
EST. Total Miles ⓘ	EST. Total Hours ⓘ	66.2

2016 Honda Accord

184403879

4170 Dennison St
East Los Angeles, CA 90023

07/26/2019 2:55 PM MOVING
for 51m

Show History

Nearest Landmark

Dispatch Vehicle

Edit Asset

Asset Status

W
Heading

19 mph
Speed

Jul 26, 2019 @ 2:55 PM
Last Report Date

Asset Details

Home Group
Group

Tim Meyer
Driver

Vehicle-Light Duty
Asset Type

65.3
Engine Hours

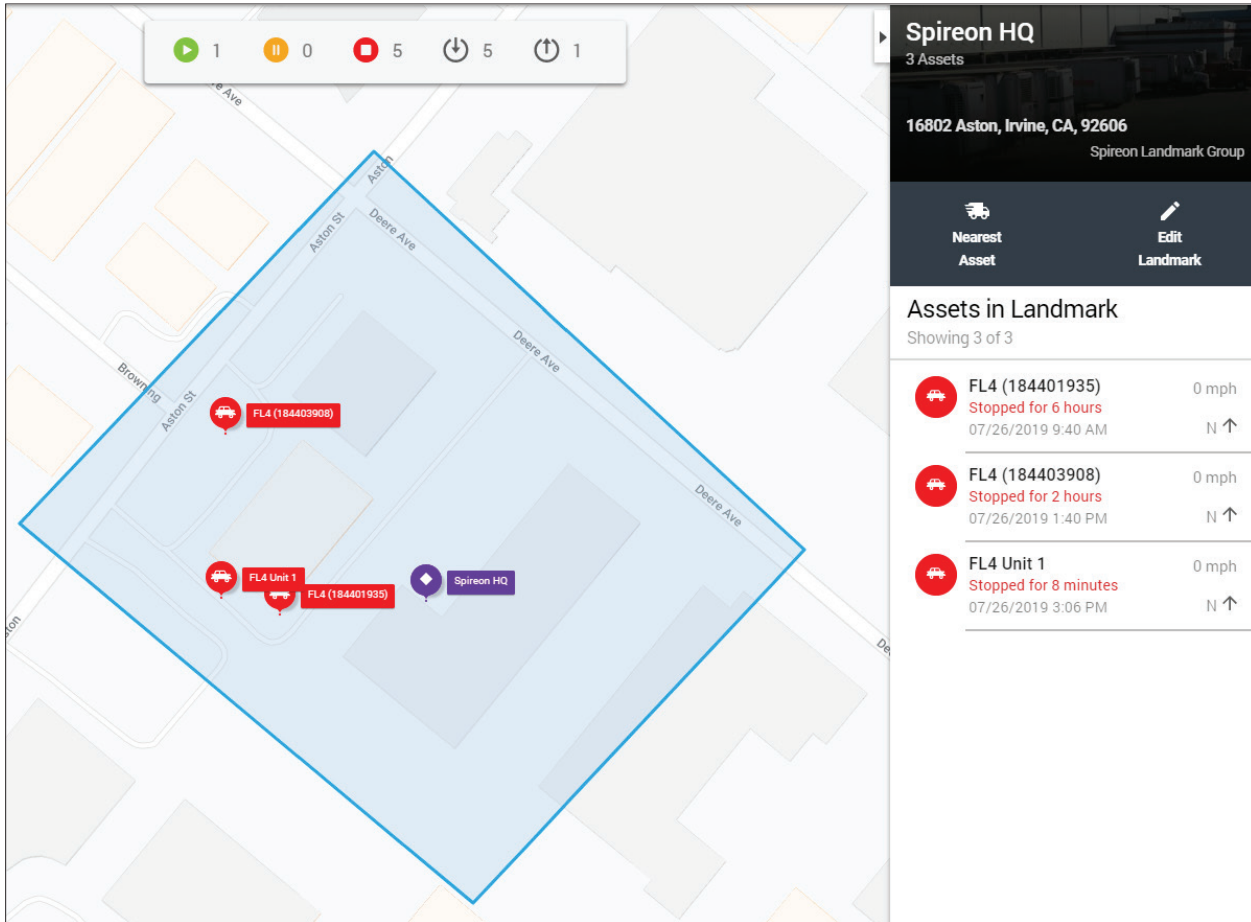
Good
Battery Status

12.3
Ext Volt

34.02035
Latitude

Landmark Map Details

When clicking on any of the Landmarks on the map, the detail view of the respective Landmark will be visible on the map. From here, additional actions can be taken.



The screenshot displays a map with a blue-shaded landmark area. A sidebar on the right provides details for the selected landmark, 'Spireon HQ'. The sidebar includes the following information:

- Spireon HQ**
3 Assets
- 16802 Aston, Irvine, CA, 92606
Spireon Landmark Group
- Buttons: Nearest Asset, Edit Landmark
- Assets in Landmark**
Showing 3 of 3

Asset ID	Status	Speed	Last Update	Direction
FL4 (184401935)	Stopped for 6 hours	0 mph	07/26/2019 9:40 AM	N ↑
FL4 (184403908)	Stopped for 2 hours	0 mph	07/26/2019 1:40 PM	N ↑
FL4 Unit 1	Stopped for 8 minutes	0 mph	07/26/2019 3:06 PM	N ↑

Nearest Asset

Provides a route to the nearest asset from the landmark shown on the map.

Edit Landmark

Provides an edit view of this Landmark.

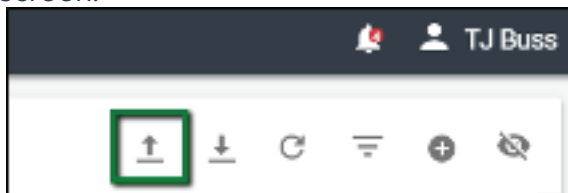
FLEET

Import Functionality

Note that in order to perform imports you have to be an admin user of the account.

Asset Import

To import a new file the upload icon can be found on the top right of the Fleet tab > asset subtab screen:



Clicking on it will display the upload file requirements
A sample file can be downloaded for further explanation
The following must be followed:

Please read the following instructions. It is important that the import file has the columns required and optional in order from left to right as shown in the sample import file

Use the Asset Import to add or update vehicles into the system. The Asset Name identifies an existing Asset Name to update, or to add if that specific Asset Name is not found in the account. Double check your Asset Names for accuracy before import. The asset fields that can be entered are outlined below. Column headers are mandatory.

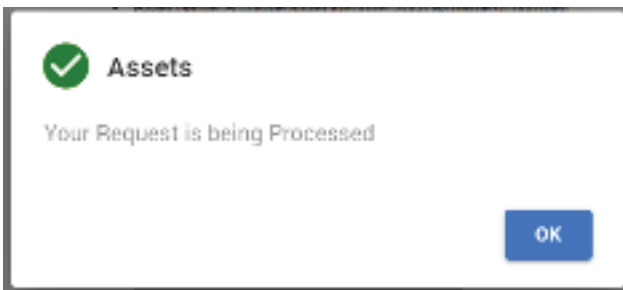
Required:

- Asset Name: A unique asset identifier such as name or number
- Asset Icon: Choose only ONE: Boat, Bus, Car, Cement Truck, Dump Truck, Excavator, Flat Bed, Generator, Motorcycle, Snowmobile, Tractor, Trailer, Truck, Van
- Asset Type: Choose only ONE: Equipment, Trailer, Vehicle-Heavy Duty, Vehicle-Medium Duty, Vehicle-Light Duty
- VIN: Asset VIN

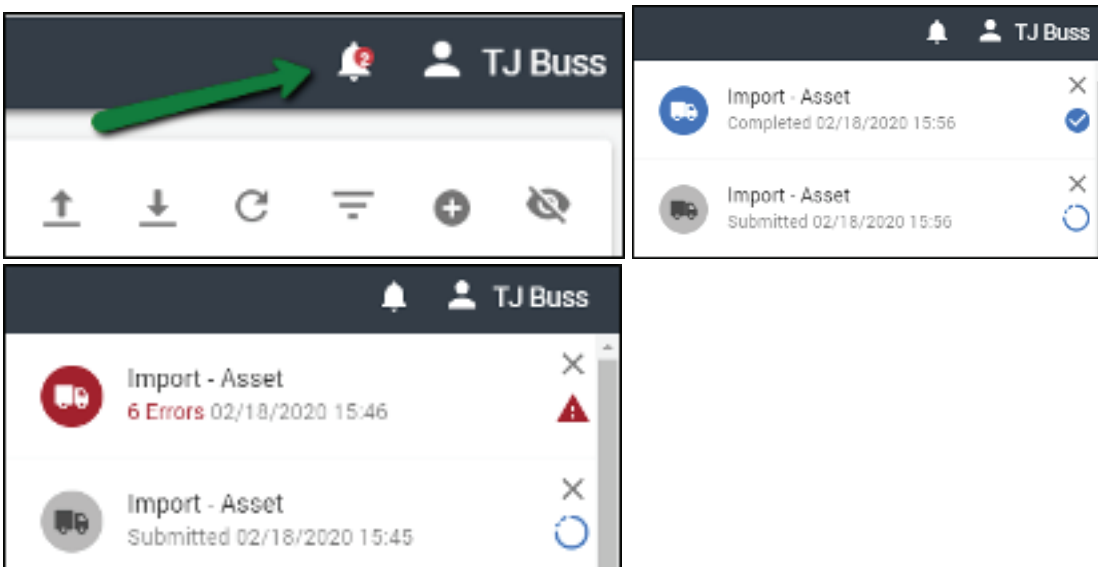
Optional (may be left empty):

- Make: Make of asset
- Model: Model of asset
- Year: Year of asset (4 digits max)
- Initial Odometer: (Mileage Before GPS Install) The asset’s mileage at the point of install, the GPS device will take over from this point (value must be in miles even if your account displays KM, max 15 digits)
- Asset Group: The group this asset belongs to. We will add a new group or update to an existing group based on name
- Device Serial Number: Enter a device serial number from your account optionally to automatically pair the asset to that device on import
- Tags: Multiple tags can be separated by comma

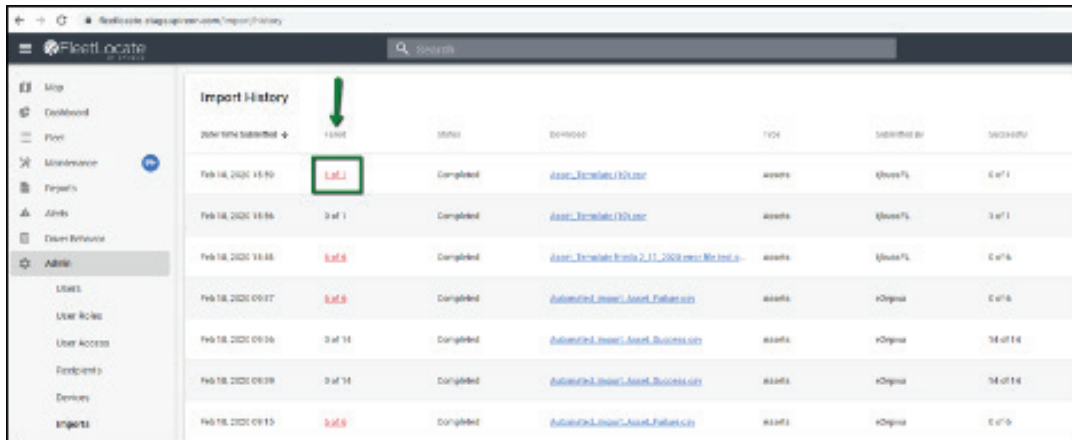
The user can upload a file and will be presented with an Upload in process pop up after clicking the Import button at the bottom right of the page.



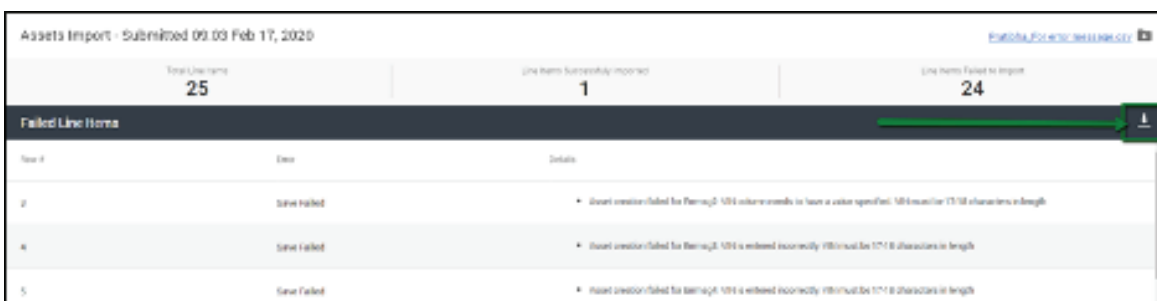
After the user clicks ok the Notification center icon will display a new message showing the file upload in process or a success and a success upload or fail upload message:



If an import has errors you can view these by clicking on the notification itself or by going to the Admin > Imports tab and clicking on the “Failed” column row for the failed import file.



Each row that has experienced an import error will display here. You may download only the failed rows by clicking on the download button on the top right of this screen:



If a file has been imported successfully you will always have the Import tab to review when the file was imported and what content was in it.

Landmark Import

Flow of import is the same as assets. The requirements for import are as follows:

IMPORT BY ADDRESS

Step 1: Download template

Step 2: Check the below requirements. Headings must follow order in template. Commas are not allowed in the data.

Step 3: Add rows of data and save csv

Step 4: Select csv file and upload

Importing an Address .CSV

Import files must have the same header name rows as the import template shows.

- Column A : Landmark Name (no commas) - Required
- Column B : Comments (no commas, up to 50 characters) - Optional
- Column C : Phone Number (enter as 10 digit value) - Optional
- Column D : Import Type (SETBYADDRESS required for each row) - Required
- Column E : Street Address (enter without commas) - Required
- Column F : City (enter without commas) - Required
- Column G : State (in abbreviation format) - Required
- Column H : Zip Code - Required
- Column I : Radius in meters (enter up to a 5 digit value) - Required

IMPORT BY LAT/LONG

Step 1: Download template

Step 2: Check the below requirements. Headings must follow order in template. Commas are not allowed in the data.

Step 3: Add rows of data and save csv

Step 4: Select csv file and upload

Importing a Latitude and Longitude .CSV

Import files must have the same header name rows as the import template shows.

Required:

- Column A : Landmark Name (no commas) - Required
- Column B : Comments (no commas, up to 50 characters) - Optional
- Column C : Phone Number (enter as 10 digit value) - Optional
- Column D : Import Type (SETBYLATLONG required for each row) - Required
- Column E : Latitude - Required
- Column F : Longitude - Required
- Column G : Radius in meters (enter up to a 5 digit value) - Required

IMPORT BY POLYGON POINTS

Step 1: Download template

Step 2: Check the below requirements. Headings must follow order in template. Commas are not allowed in the data.

Step 3: Add rows of data and save csv

Step 4: Select csv file and upload

Importing a Polygon Points .CSV

Import files must have the same header name rows as the import template shows. Polygon latitude and longitude points are formatted like XX.XXXXXX;-XXX.XXXXXX

Required:

- Column A : Landmark Name (no commas) - Required
- Column B : Comments (no commas, up to 50 characters) - Optional
- Column C : Phone Number (enter as 10 digit value) - Optional
- Column D : Import Type (SETBYPOLY required for each row) - Required
- Column E : Furthest north point of polygon - Required
- Column F : Next point clockwise from Column E - Required
- Column G : Next point clockwise from Column F - Required

All subsequent points are added clockwise.

Driver Import

Flow of import is the same as assets. The requirements for import are as follows:

Please read the following instructions. It is important that the import file has the columns required and optional in order from left to right as shown in the sample import file

A header column is required as shown in the sample file. Drivers are identified by their First and Last Name. The following columns are permitted.

Required:

- First Name: First name of the user (max 30 chars)
- Last Name: Last name of the user (max 30 chars)
- Phone: Phone Number (enter as 10-16 digit value)
- Email: Email address for the user (must be a valid email format)
- License Number: Driver's license number (max 20 chars)
- License State (max 50 chars)

Optional (may be left empty):

- Comments: Up to 250 chars

User Import

Flow of import is the same as assets. The requirements for import are as follows:

Please read the following instructions. It is important that the import file has the columns required and optional in order from left to right as shown in the sample import file

A header row is required as shown in the sample file. Users are identified by their username. The following columns are permitted.

Required:

- First Name: First name of the user (required, max 250 chars)
- Last Name: Last name of the user (required, max 250 chars)
- Email: Email address for the user (required, must be a valid email format)
- Username: Desired Username (required, max 250 chars)

Optional (may be left empty):

- Phone: Phone Number (enter as 10 digit value)
- Comments: Up to 250 chars
- Invitation: Send the user an invitation with instructions on how to log in to the LocalFleet application? (Yes and No values accepted, defaults to No if left blank)

Asset Tab

Assets	Q	ADVANCED										
Actions	Name	Asset Type	Serial Number	Address ↓	City	State	Zip Code	Driver	Engine Hours	Status	Battery Status	Ext Volt
	2016 Honda Accord	Vehicle-Light Duty	184403879	564 E Cesar E Chavez A...	Los Angeles	CA	90012	Tim Meyer	66.2	Moving	Good	14.2
	FL4 (184404009)	Vehicle-Light Duty	184404009	17249 Peach	Irvine	CA	92612	Chris Ballac	8.9	Stopped	Weak	0
	FL4 Unit 1	Vehicle-Light Duty	184404146	16832 Aston	Irvine	CA	92606	Lisa Neumeyer	30.5	Stopped	Good	12.7
	FL4 (184401935)	Vehicle-Light Duty	184401935	16818 Aston	Irvine	CA	92606	Tina Neuer	28.2	Stopped	Good	12.8
	FL4 (184403908)	Vehicle-Light Duty	184403908	16795 Aston	Irvine	CA	92606	Garry Butler	18.2	Stopped	Good	12.2
	GM Unit Tahoe	Vehicle-Light Duty	1GNSCBKC9JR1480...	13040 Orange St	Eastvale	CA	92880	Claudia Winn	17.0	Stopped	Non Reporting	

When clicking on “Assets” within the Fleet navigation, all Assets within the account are listed. From here, an asset can be created, edited or assigned to a device.

The following actions can be taken within this list:

1. Download all assets by clicking the download icon



2. Refresh the page by clicking refresh



3. Filter the page by clicking on the filter icon



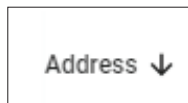
4. Create a new asset by clicking on the Add Asset icon



5. Show or hide columns in the list view



6. Sort each row by clicking on the row header



7. Reorder the list items from left to right by dragging and dropping a column

8. Edit and Asset by clicking on the edit button to the left of the items row.

Actions	Name	Asset Type	Serial Number	Address ↓	City	State	Zip Code	Driver
	2016 Honda Accord	Vehicle-Light Duty	184403879	564 E Cesar E Chavez A...	Los Angeles	CA	90012	Tim Meyer



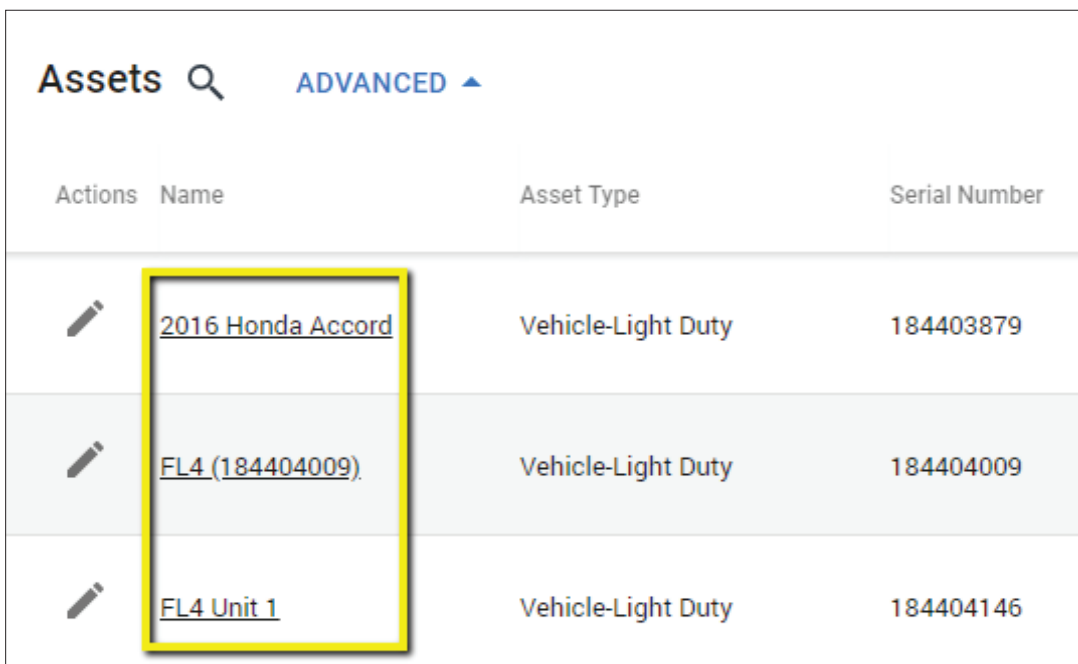
9. Search for an asset by clicking on the search icon in the top left of the header




10. Use the advanced search for more detailed search options.



The screenshot shows an 'Assets' search interface with an 'ADVANCED' dropdown menu. The search form includes fields for Asset Name, Group, Serial Number, VIN, Year, Make, Model, and Tag. There are 'CLOSE', 'CLEAR', and 'SEARCH' buttons at the bottom right.

11. Clicking on the assets name will guide you back to the asset details view on the map page.



Actions	Name	Asset Type	Serial Number
	2016 Honda Accord	Vehicle-Light Duty	184403879
	FL4 (184404009)	Vehicle-Light Duty	184404009
	FL4 Unit 1	Vehicle-Light Duty	184404146

Fleet - Advanced Bundle Option (Diagnostics)

If you subscribe to the Advanced Fleet Bundle (applicable for GM, Ford, FL1, and FL4 telematics solutions), the following additional information may be visible to you within the asset tab:

- Seatbelt Status
- Tire Pressure
- Engine Oil Life Remaining
- Fuel Tank Level

Creating an Asset



1. Click on the Add Asset icon inside the Asset tab.
2. In the Add Asset window, fill out the required fields marked with an *.
 - a. Note: Fields marked with an * must be filled out in order to save.
 - b. Note: Assigning a device serial number to the vehicle is optional. If a vehicle is not paired with a device, it will not appear on the map page.
3. Assign Inputs to the vehicle (optional).
4. Click Save.

Editing an Asset

1. Edit an Asset by clicking on the edit button to the left of the row.

Actions	Name	Asset Type	Serial Number	Address ↓	City	State	Zip Code	Driver
	2016 Honda Accord	Vehicle-Light Duty	184403879	564 E Cesar E Chavez A...	Los Angeles	CA	90012	Tim Meyer

2. From the Edit Vehicle window, all elements of the vehicle can be edited.
3. Click Save.
4. Click Delete to permanently remove a vehicle from your account.

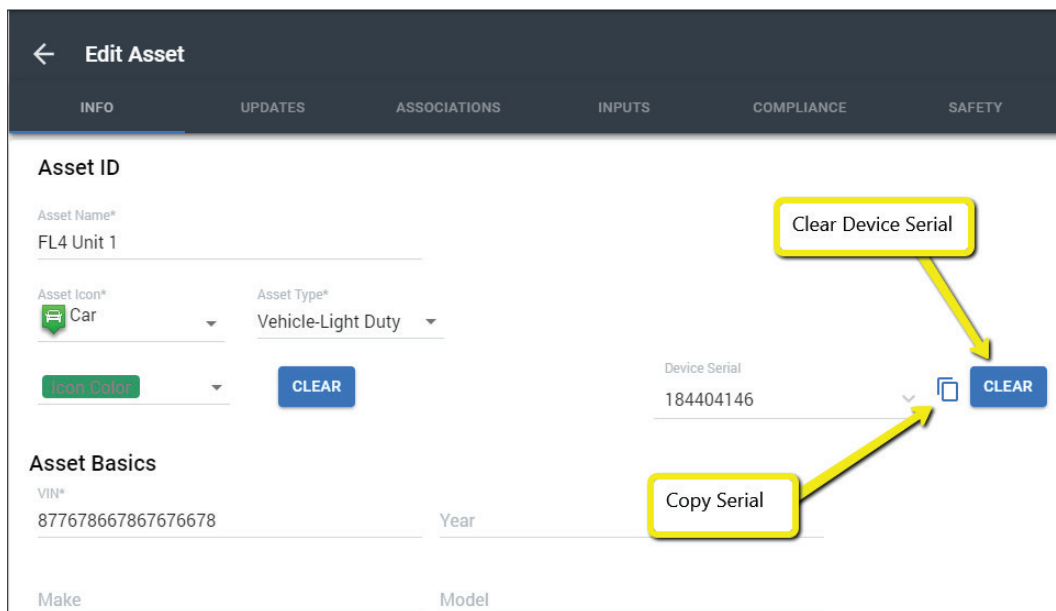
Unlinking an Asset from a Device

Devices can be disassociated from their assigned assets. Once a device and vehicle are disassociated, a new device and/or vehicle can be assigned.

1. Edit an Asset by clicking on the edit button to the left of the items row

Actions	Name	Asset Type	Serial Number	Address ↓	City	State	Zip Code	Driver
	2016 Honda Accord	Vehicle-Light Duty	184403879	564 E Cesar E Chavez A...	Los Angeles	CA	90012	Tim Meyer

2. From the Edit Vehicle window, all elements of the vehicle can be edited.
3. Under the Info section on top, go to the Device Serial field.
4. Click Clear to disassociate the Device Serial from the selected vehicle.
5. Click Save.
 - a. Note: you may also copy the device serial number by clicking on the Copy symbol to the right of the Device Serial field.



The screenshot shows the 'Edit Asset' screen with the following details:

- Asset ID:** FL4 Unit 1
- Asset Name*:** FL4 Unit 1
- Asset Icon*:** Car
- Asset Type*:** Vehicle-Light Duty
- Device Serial:** 184404146
- Asset Basics:** VIN* 877678667867676678







Annotations in the image:

- A yellow box labeled "Copy Serial" points to the copy icon next to the Device Serial field.
- A yellow box labeled "Clear Device Serial" points to the CLEAR button next to the Device Serial field.


Landmark Tab

When clicking “Landmarks” within the Fleet navigation, all Landmarks within the account are listed. From here, a landmark can be created or edited.

The following actions can be taken within this list:

1. Download all landmarks by clicking the download icon. 
2. Refresh the page by clicking refresh. 
3. Filter the page by clicking on the filter icon. 
4. Create a new landmark by clicking on the Add Landmark icon. 
5. Show or hide columns in the list view. 
6. Sort each row by clicking on the row header. 
7. Reorder the list items from left to right by dragging and dropping a column.
8. Edit a Landmark by clicking on the edit button to the left of the items row.
9. Search for a landmark by clicking on the search icon in the top left of the header.

CREATING A LANDMARK

1. Create a new landmark by clicking on the Add Landmark icon. 
2. In the Add Landmark window, fill out the required fields marked with an *, and select a Landmark Icon from the dropdown.
 - a. The Latitude and Longitude fields will default to the center of the map on the Landmarks Page.
 - b. If the address fields are filled out, the Latitude and Longitude fields will automatically populate.
3. Fill out the remaining fields and assign the landmark to a Group (optional).
4. The fields above the map allow you to choose the landmark’s Shape, Radius, Line Color, Fill Color, Transparency and Line Width.
 - a. A Line Width of 0 will hide the landmark’s borders.


Asset Group Tab

When clicking on “Asset Groups” within the Fleet navigation, all Asset Groups within the account are listed. From here, an asset group can be created or edited.

The following actions can be taken within this list.

1. Refresh the page by clicking Refresh.
2. Create a new asset group by clicking on the Add icon.
3. Show or hide columns in the list view.
4. Sort each row by clicking on the row header.
5. Reorder the list items from left to right by dragging and dropping a column.
6. Edit an asset group by clicking on the edit button to the right of the items row.
7. Delete an asset group by clicking on the trash icon to the right of the items row.
8. Add a Sub-group to the main group by clicking the add subgroup icon to the right of the items row.
9. Search for an asset group by clicking on the search icon in the top left of the header.

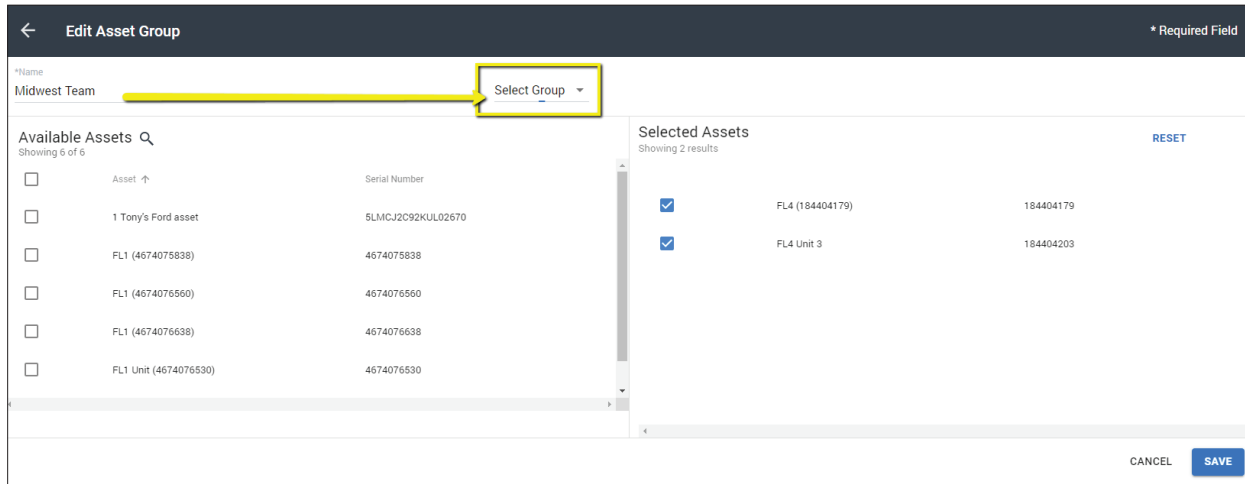
CREATING AN ASSET GROUP

1. Create a new asset group by clicking on the Add icon 
2. This opens the Add Asset Group window.
3. Name the new Asset Group.
4. Use the checkboxes to select all assets to be put in the new group.
5. Assets will automatically move to the right (selected assets) panel when checked.
6. Click Save.

CREATING AND EDITING ASSET SUBGROUPS

1. To add an existing group as a subgroup of another click on the edit group icon to the right of the groups row
2. Within the edit window a “Select Group” drop down is shown
3. Select a group from the drop down that you wish to be one hierarchy up from the group you are currently viewing.

4. Click “save” and view the group hierarchy change after you click save.



5. To add a new subgroup to an existing group or subgroup from scratch simply click on the add icon next to the existing groups row.



Landmark Group Tab

When clicking on “Landmark Groups” within the Fleet navigation, all Landmark Groups within the account are listed. From here, a landmark group can be created or edited.

The following actions can be taken within this list.

1. Refresh the page by clicking refresh.



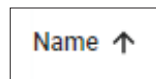
2. Create a new landmark group by clicking on the Add icon.



3. Show or hide columns in the list view.



4. Sort each row by clicking on the row header.



5. Reorder the list items from left to right by dragging and dropping a column.

6. Edit a landmark group by clicking on the edit button to the right of the items row.

7. Delete a landmark group by clicking on the trash icon to the right of the items row.

8. Add a Sub-group to the main group by clicking the add subgroup icon to the right of the items row.

9. Search for a landmark group by clicking on the search icon in the top left of the header.

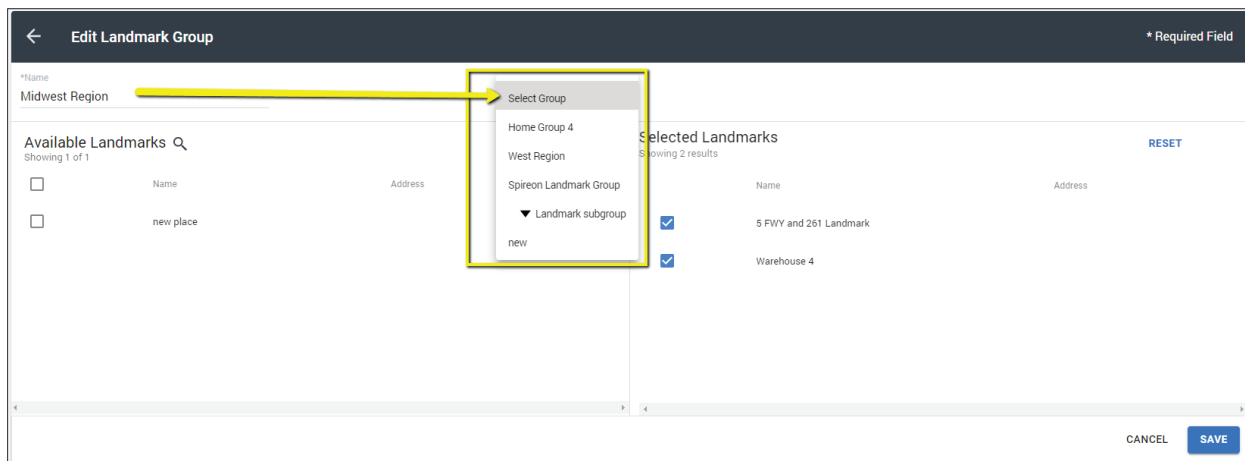
CREATING A LANDMARK GROUP



1. Create a new asset group by clicking on the Add icon.
2. This opens the Add Landmark Group window.
3. Name the new Landmark Group.
4. Use the checkboxes to select all assets to be put in the new group. Landmarks will automatically move to the right hand side (selected assets) panel when checked.
5. Click Save.

CREATING AND EDITING LANDMARK SUBGROUPS

1. To add an existing group as a subgroup of another click on the edit group icon to the right of the groups row
2. Within the edit window a “Select Group” drop down is shown
3. Select a group from the drop down that you wish to be one hierarchy up from the group you are currently viewing.
4. Click “safe” and view the group hierarchy change after you click safe.







5. To add a new subgroup to an existing group or subgroup from scratch simply click on the add icon next to the existet groups row.

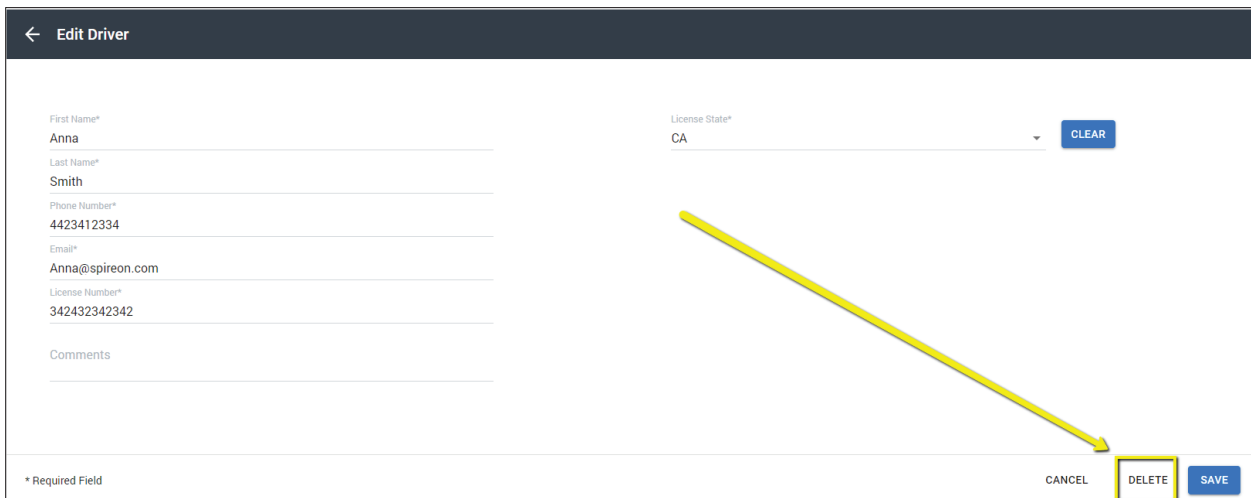


Driver Tab

When clicking on “Drivers” within the Fleet navigation, all Drivers within the account are listed. From here a driver can be created or edited.

The following actions can be taken within this list.

1. Refresh the page by clicking refresh. 
2. Filter the page by clicking on the filter icon. 
3. Create a new driver by clicking on the Add icon. 
4. Show or hide columns in the list view. 
5. Sort each row by clicking on the row header.
6. Reorder the list items from left to right by dragging and dropping a column.
7. Edit a driver by clicking on the edit button to the left of the items row.
8. Delete a driver by clicking on the edit button to the left of the items row and clicking the Delete button at the bottom right of the driver edit screen



9. Search for a driver by clicking on the search icon in the top left of the header.

Maintenance

These actions are available under the Maintenance tab.

STATUS TAB

Selecting the Status tab reveals all assets currently under a Service Plan.

1. Add a new Service Record for a specific asset by clicking the add symbol. 

2. Filter the page by clicking on the filter icon. 

3. Show or hide columns in the list view. 

4. Sort each row by clicking on the row header.

5. Reorder the list items from left to right by dragging and dropping a column.

SERVICE PLANS TAB

In the top right of the Service Plans tab you can:

1. Add a new Add Service Record by clicking the add symbol. 

2. Filter the page by clicking on the filter icon. 

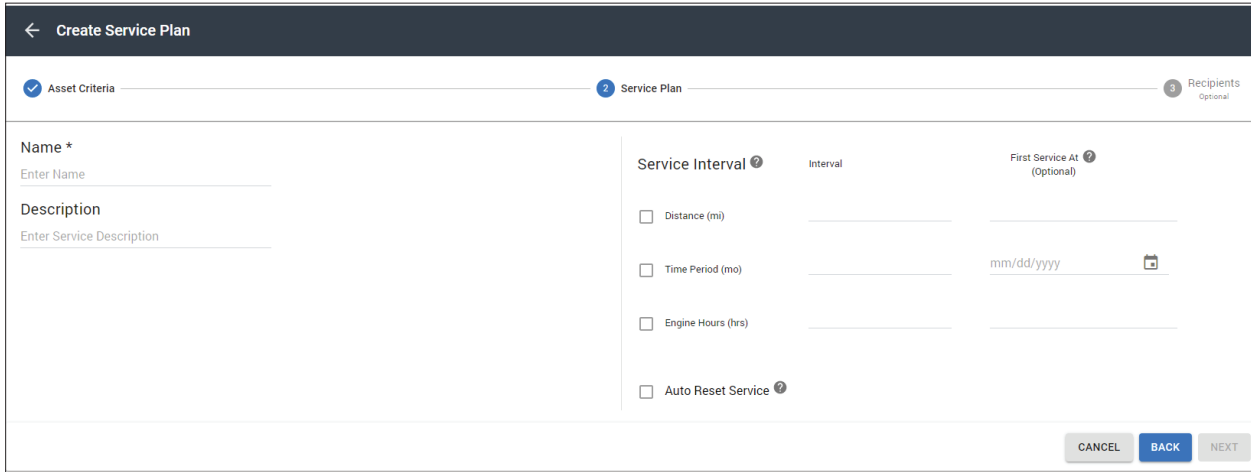
3. Show or hide columns in the list view. 

4. Sort each row by clicking on the row header.

5. Reorder the list items from left to right by dragging and dropping a column.

6. Edit an existing service plan by clicking on the Edit icon to the left of the plan items row.

ADD A NEW SERVICE PLAN



1. In step 1 of the pop up wizard, select which assets you would like to create the service plan for
2. In step 2 of the wizard, specify all required information:
 - a. Enter a Name for the service.
 - b. Enter Description of service (optional).
 - c. Use the Service Interval field to select any or all of the metrics (Distance, Time Period, Engine Hours) to send Alert to whomever is under recipients list. (Select at least one metric.)
 - i. Note: If multiple criteria in the Service Record window are selected, the alert is issued only for the first criteria to reach its interval limit.
 - d. In the optional First Service At section, choose what value to have an alert sent for first time.
 - e. Auto Reset Service resets alert to previously chosen interval when the set threshold has been reached.
 - i. Vehicle in Status grid will be highlighted in RED when interval has been met only when “Auto Reset Service” is unchecked
 - ii. A service interval having reached its limit is reset to start a new interval even if no service record is added when “Auto Reset Service” is checked. No red highlights will be shown in the status page in this scenario.
3. In step 3, use the Add Recipient field to add emails or mobile numbers. These recipients will be notified when the maintenance alert has been triggered.




EDIT A SERVICE PLAN

To edit a service plan, click on the pencil icon under the Action column on the left to open the Edit Service Plan window.

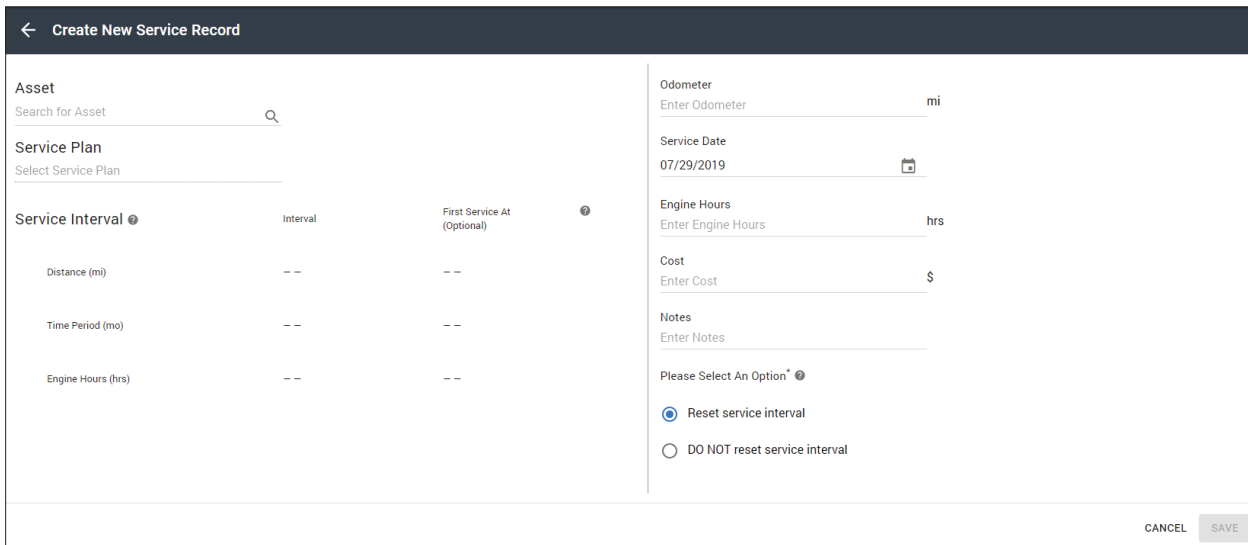
1. In the Edit Service Plan window, you can change the following fields: Name, Description, Add Recipient, and Recipient List.
2. Make desired changes to Service Plan then click Save.

SERVICE RECORDS TAB

In the top right hand corner of the Service Records tab you can:

1. Add a new Add Service Record by clicking the add symbol. 
2. Filter the page by clicking on the filter icon. 
3. Show or hide columns in the list view. 
4. Sort each row by clicking on the row header.
5. Reorder the list items from left to right by dragging and dropping a column.
6. Edit an existing service plan by clicking on the Edit icon to the left of the plan items row.

Add a Service Record



Create New Service Record

Asset
Search for Asset

Service Plan
Select Service Plan

Service Interval	Interval	First Service At (Optional)
Distance (mi)	--	--
Time Period (mo)	--	--
Engine Hours (hrs)	--	--

Odometer
Enter Odometer mi

Service Date
07/29/2019

Engine Hours
Enter Engine Hours hrs

Cost
Enter Cost \$

Notes
Enter Notes

Please Select An Option

Reset service interval

DO NOT reset service interval

CANCEL SAVE

To bring up the Add Service Record window, click the Add Service Record in the top right corner.

1. Select vehicle and select service plan for your vehicle.
2. In the Service Record window enter the appropriate information in the Odometer, Service Date (mandatory), Engine Hours, Cost, fields. (Engine hour and Odometer are pre-populated with current vehicle values, but can be changed to reflect less than current values as needed).
3. Clicking Reset Service Interval will reset service interval for the selected vehicle. Metrics that were overdue and highlighted in red will now be back to regular state. (Only applicable for service plans that do NOT have “Auto Reset Service” selected).
 - a. If Do NOT Reset Service Interval is clicked, the record will be saved but the service record will not be reset. (Metrics that were overdue and highlighted in red will stay in highlighted state if the Service Interval is not reset).



Edit a Service Record

1. To Edit Service Record, click on the pencil icon under the Action column to the left to open Edit Service Plan window.
2. Make desired changes to Service Record and click Save.

MAINTENANCE ALERTS TAB

Maintenance Alerts					
Date ↓	Time	Alert Type	Service Plan Name	Asset	Details
Jul 29, 2019	15:24	Maintenance Alert	Test Spireon Ivy	6RRU	6RRU is due for maintenance (distance: 22120 mi (35599 km)) as of: 07/29/2019. [Bryan Ave, Tustin, CA, 92780]
Jul 29, 2019	14:34	Maintenance Alert	Test Spireon Ivy	TJ FL18S Tahoe	TJ FL18S Tahoe is due for maintenance (distance: 50022 mi (80502 km)) as of: 07/29/2019. [12800 Mare Mead]
Jul 29, 2019	14:15	Maintenance Alert	New_Nodes_Maint_...	TJ FL18S Tahoe	TJ FL18S Tahoe is due for maintenance (engine hours: 1573) as of: 07/29/2019. [GMTest2School]
Jul 29, 2019	14:15	Maintenance Alert	ven eng	TJ FL18S Tahoe	TJ FL18S Tahoe is due for maintenance (engine hours: 1573) as of: 07/29/2019. [GMTest2School]
Jul 29, 2019	14:15	Maintenance Alert	26072019-Tag	TJ FL18S Tahoe	TJ FL18S Tahoe is due for maintenance (engine hours: 1573) as of: 07/29/2019. [GMTest2School]

The Alerts section provides a history of all Maintenance alerts that have been sent out.

1. Filter the page by clicking on the filter icon. 
2. Show or hide columns in the list view. 
3. Sort each row by clicking on the row header.
4. Reorder the list items from left to right by dragging and dropping a column.
5. Edit an existing service plan by clicking on the Edit icon to the left of the plan items row.

MAINTENANCE DIAGNOSTICS TAB (DTCS)

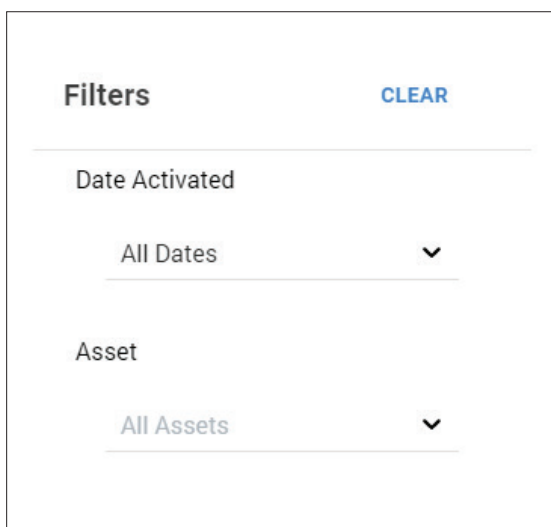
- ONLY available with an Advanced Bundle subscription.
- ONLY applicable to the following device types: FL OnStar, FL1, FL4

Map Fleet Maintenance	Diagnostic Codes				
	Status	Asset	DTC Code	Date	Description
Status Service Plans Service Records Alerts Diagnostics	Active	AllVan-edit	P0301	Jul 28, 2019	Cylinder 1 Misfire Detected
	Cleared	AllVan-edit	P0300	Jul 28, 2019	Random/Multiple Cylinder Misfire Detected
	Active	TJ Altima edit	P0420	Jul 28, 2019	Catalyst System Efficiency Below Threshold Bank 1

The Maintenance Diagnostics tab will show (if applicable) any DTC code that has been sent by a unit while the vehicle has been activated within the user interface.

If a vehicle in the account that you have access to has a fault code active, then the status of this code will show as ACTIVE. Once the vehicle is taken to a mechanic and the fault code was cleared the status of this DTC code will show as CLEARED.

If you wish to see only the DTC codes for one specific asset and/ or time frame you can filter on the top right of the page for a particular vehicle and or time at which the DTC code first appeared by clicking on the filter symbol to expand the filter bar.



The DTC Code description will provide the SAE standard description for all generic DTC codes from applicable units and GM-specific descriptions for GM units only.

Reports Tab

REPORT TYPES

Alerts

Shows the total alerts sent to the selected vehicle(s), the most frequent alert sent, the time sent and the location the alert was generated. If multiple vehicles are selected, this report will also show the vehicle with the greatest number of alerts.

Daily Details

Shows the stop time, move time, run time, idle time, total distance, number of stops, landmarks and inputs for each vehicle during the selected day. If a vehicle's information is expanded, this report will show the total values for previous days as well.

Fuel Card Reports

Please see Fuel Card Add-On Section at the end of this guide.

Idle

Shows the amount of time a vehicle has been idling (ignition on without movement). When a group is expanded, specific information for each vehicle is displayed.

Inactivity

Shows total inactivity time, total inactive vehicles, most inactive vehicle, average inactive time per group and average inactive time per vehicle. User specifies inactivity duration they would like reported. Each vehicle's group, inactivity start time, last driver, current location and inactivity duration are also shown.

Inputs

Shows all of the Input Alerts for each vehicle during the specified reporting period. Input parameters are user-defined.

Landmark Circulation

Shows the total visits, average visits per day, total duration of visits and average duration of visits for all selected landmarks. When expanded, specific data for each landmark is shown.

Landmark Mileage

Shows the distance traveled of a vehicle within a landmark.

Location History

Shows all events for each vehicle during the specified reporting period. Includes total number of events, total landmarks visited, distance traveled, average speed, highest speed for all vehicles. Each specific vehicle also shows date/time, type of event, drive, location, latitude, longitude, heading and speed.

Maintenance

Shows all scheduled maintenance alerts by maintenance type and vehicle.

State Mileage

Shows the distance traveled in each state by any vehicle during the specified reporting period.

Stops

Shows all of the stops that occurred for the vehicle(s) during the specified reporting period. When a group's information is expanded, specific vehicle data is shown. When a vehicle's information is expanded, specific data for each stop is shown.

Temperature

Shows the temperature of selected vehicle over time.

Trips – Consolidated/Utilization

Shows a summary of all trips over a certain distance for each vehicle during the reporting period. Includes ignition on/off, move time, time ignition was on, idle time, distance, max speed and start/end address. In order for this report to work, the ignition wire must be connected.

Vehicle Status

Shows Total Distance, Total Engine Hours, Battery Voltage, Percentage of Oil Life Remaining Tire Pressure in PSI Last Event Date, Asset Type, Asset Group and Tags.

Workday Details Report

Shows start and end times, start and end addresses, elapsed time, move time, engine off time, idle time and off duty time for each vehicle on each day during the specified reporting period.

FILTERING THE REPORT HISTORY

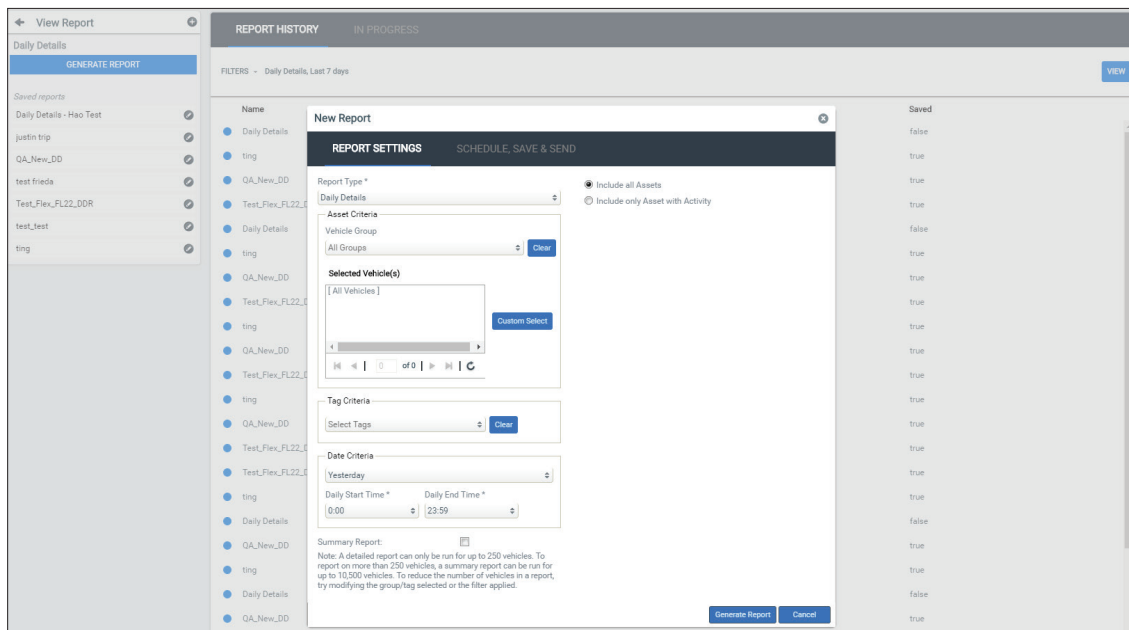
1. At the top left of the tab, click the Filters dropdown.
2. Select your desired filters from the available options.
3. Click Filter. The History tab will update with the filtered data.

CLEARING FILTERS FROM THE REPORT HISTORY

1. To clear your selected filters, click the Clear Filtering button to the right of the filter selection.
2. The History tab will refresh with no filters.

GENERATING A REPORT

1. Select a Report Type from the left side.
2. Click Generate Report to open the New Report window.
3. In the New Report window, specify all required information, e.g. Vehicle Group(s), Vehicle(s), Date Range, Daily Start Time and Daily End Time.
4. If applicable, select other options, e.g. types of alerts, length of Idle events, length of Inactivity, Landmark Group, etc.
5. Click Generate Report.



SCHEDULING A REPORT

1. In the New Report window, click the Schedule, Save & Send tab.
2. Click the check box next to Schedule Delivery.
3. Use the Schedule Delivery dropdown to select a frequency for the report to be run.
4. Use the Report Format dropdown to choose a file format for the report.
5. Click Save Report or Save & Generate Report.

New Report ✕

REPORT SETTINGS **SCHEDULE, SAVE & SEND**

Save Configuration:

[Enter Report Name]

Schedule Delivery:

[Select Delivery Schedule] ▾

Report Format:

[Select Report Format] ▾

Add Recipient

[Enter Recipient Email] +

Recipient List

No recipients

Comments

[Text Area]

SAVING A REPORT

1. In the Schedule, Save & Send tab, click the check box next to Save Configuration.
2. Enter a name for the selected report parameters.
3. Click Save Report.
4. This report can now be run at any time by selecting the type of report from the left side, then choosing from the Saved reports list.

SENDING A REPORT

1. In the New Report window, click the Schedule, Save & Send tab.
2. In the Add Recipient field, enter the recipient email address(es).
3. Click Generate Report.

DELETING A REPORT

1. Click the Edit icon next to the report you would like to delete.
2. In the Edit Report window, click the Delete button.

Dashboards

SUMMARY

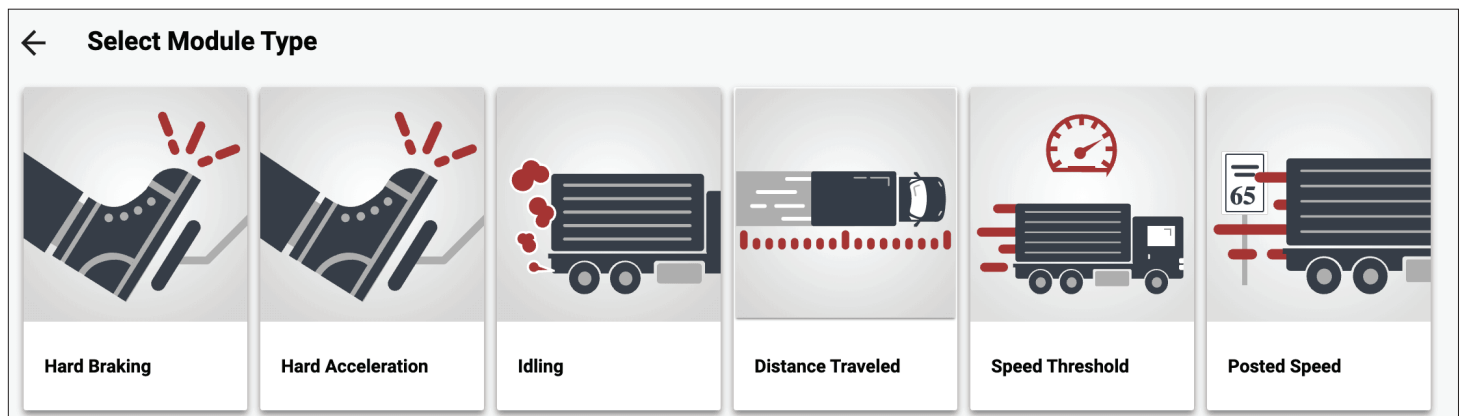
The purpose of a dashboard is to present key performance indicators, or KPIs, in a clear and understandable visual format. The fleet manager can leverage KPI data to assist in making business decisions.

Here are some of the key features provided in FleetLocate Dashboards.

- Customize the look and feel of the dashboard per user preference.
- Select different types of KPIs for the dashboard.
- Display the KPIs as a trendline, a leaderboard, or a map
- Define the asset, the duration, and visualization for each tile.
- Drill down to either detail or aggregate formatted data.

Key Performance Indicators for Fleet Dashboards

FleetLocate Dashboards are a reflection of driver utilization and behavior, based on the following six KPIs.



AGGRESSIVE DRIVING

The National Highway Traffic Safety Administration defines aggressive driving as “the operation of a motor vehicle in a manner that endangers or is likely to endanger persons or property.” One of the methods to detect aggressive driving behavior is through Hard Acceleration and Hard Braking monitoring.

Both Hard Acceleration and Hard Braking occur when a driver uses more force than necessary to accelerate or stop the vehicle. Frequent hard acceleration may indicate aggressive and unsafe driving, while frequent hard braking may indicate distracted driving. Aside from safety, reduction of both hard acceleration and hard braking can also lower the overall maintenance cost of the vehicle.

In FleetLocate, Hard Acceleration and Hard Braking infractions are triggered based on the accelerometer within the telematics device with the threshold set for light/medium/heavy-duty vehicle. Hard Acceleration and Hard Braking infractions are counted by each instance as reported by the telematics device.

IDLING

Vehicle idle occurs when the vehicle ignition is active, but the vehicle is in a stopped state. When done excessively, idling impacts productivity and fuel efficiency and accelerates the need for preventive maintenance of the vehicle. Idling in the dashboard is measured in minutes.

DISTANCE TRAVELED

The ability to understand the distance traveled by the vehicle allows the fleet manager to understand the utilization of the fleet. Based on that utilization, the fleet manager can reallocate vehicles accordingly.

SPEEDING

Speeding endangers everyone on the road, and excessive speeding behavior may result in the vehicle, property, and personal liabilities for the company. To better understand the speeding behavior of a driver, the dashboard provides the following two KPIs, Exceed Speed threshold and Exceed Posted Speed.

The Exceed Speed threshold is triggered when a driver travels at a speed greater than the threshold below, measured in miles per hour.

- 55 MPH
- 60 MPH
- 65 MPH
- 70 MPH
- 75 MPH
- 80 MPH

The Posted Speed threshold is triggered when a driver travels at a speed much greater than the Posted Speed as designated on the road, measured in miles per hour.

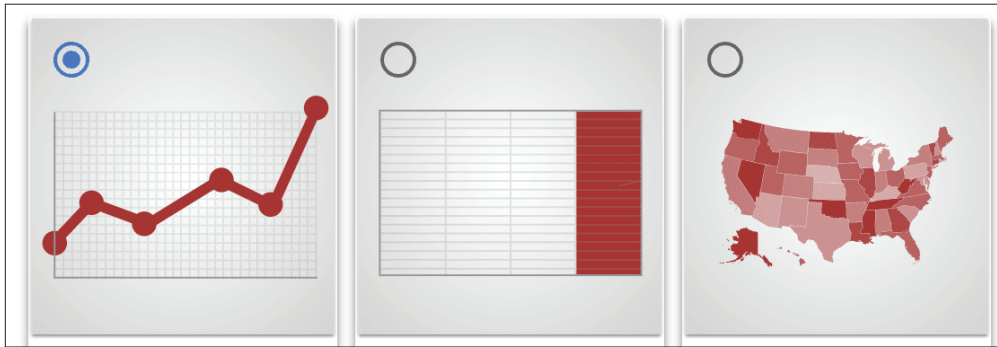
- 10 MPH Over Posted Speed
- 20 MPH Over Posted Speed
- 30 MPH Over Posted Speed

Both the Exceed Speed threshold and the Posted Speed threshold infractions are normalized to two-minute blocks, per the examples below.

- A vehicle speeding for eight minutes at 75 mph would incur four infractions in the Over 70 mph, Under 80 mph KPI.
- A vehicle speeding for one minute at 75 mph would incur one infraction in the Over 70 mph, Under 80 mph KPI.

Visualization

In addition to choosing the appropriate dashboard KPIs, the fleet manager can also select the visualization used to display the KPI data.



TRENDLINE: Displaying the data as a trendline will allow the user to understand the fleet performance over a period of time. Each data point is graphed based on the user-defined duration.

LIST: Displaying the data as a list will allow the user to review the data as a leaderboard to understand the high and low performers within the fleet.

MAP: Displaying the data over a map will allow the user to understand the fleet performance over a geographical view. Each data point on the map is consolidated of all data by county.

Drill Down

Dashboards provide the fleet manager with the ability to drill down per each data point on the visualization. There are two different configurations for drill-down, aggregate and detail.

AGGREGATE

The drill-down consolidates the data points based on the asset. For example, TJFL18S has 15 Exceed Speed Threshold infractions on 7/5/19, the drill-down will show that as a single line item rather than 15 individual rows. This feature allows the fleet manager to dig further into a specific time duration or map location to understand the performance of each asset.

	Asset Name	Serial Number	VIN	Device	Asset Group	Number of Exceed Speed Threshold Events ▼
1	GM Test Unit 2 Tahoe	1GN5CBKC9JR148042	1GN5CBKC9JR148042	#N/A	#N/A	33
2	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	15

DETAIL

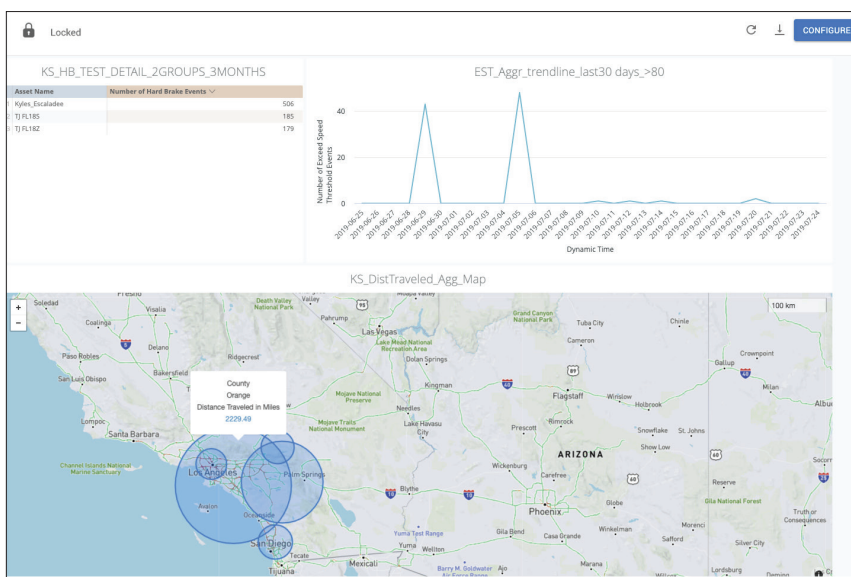
The drill-down shows all the data points without consolidation. For example, TJFL18S has 15 Exceed Speed Threshold infractions on 7/5/19, the drill-down will show each of the infractions. This feature allows the fleet manager to trace each of the infractions.

	Asset Name	Serial Number	VIN	Device	Asset Group	Driver	Time	Location	City	State	Zip	Speed
1	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 14:40:23	I- 15	Temescal Valley	CA	92883	83
2	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 14:48:27	I- 15	Lake Elsinore	CA	92530	83
3	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 14:54:30	I- 15	Wildomar	CA	92595	81
4	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 15:02:34	I- 15	Temecula	CA	92590	82
5	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 15:04:35	I- 15	Temecula	CA	92592	84
6	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 15:08:37	I- 15	Fallbrook	CA	92028	83
7	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 15:12:39	I- 15	Escondido	CA	92026	81
8	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 15:14:40	I- 15	Bonsall	CA	92084	83
9	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 15:18:42	I- 15	Escondido	CA	92026	82
10	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 18:48:39	W Citracado Pkwy	Escondido	CA	92025	88
11	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 18:52:41	I- 15	Escondido	CA	92026	85
12	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 18:54:42	I- 15	Escondido	CA	92026	85
13	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 19:00:45	I- 15	Bonsall	CA	92003	82
14	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 19:02:46	I- 15	Fallbrook	CA	92028	83
15	TJ FL18S	4641382287	3467TJTARUCKTHEAAA	#N/A	Group_15	TJ Buss	2019-07-05 19:24:57	I- 15	Lake Elsinore	CA	92532	83

With the drill-down view, a user can sort each of the columns as well as export them into a CSV format for external consumption.

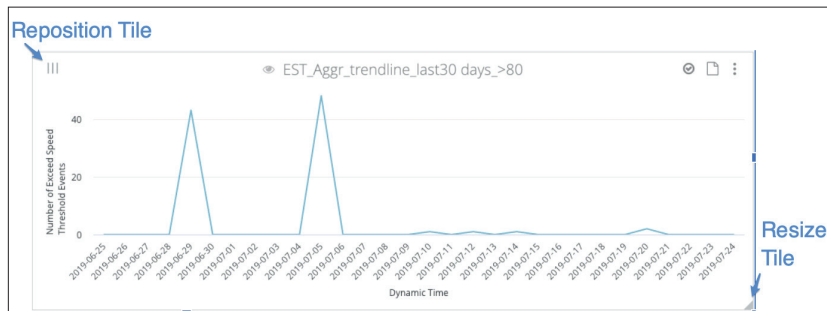
Dashboard Main Page

The dashboard can be accessed by any user role with the dashboard feature enabled. Within the dashboard, the user can visualize the data points for the vehicles he has permission to. A dashboard is made up of tiles, with each tile visualizing a single by time and user preference.



LOCKED/UNLOCKED

The locked/unlocked feature gives the user the ability to customize the look of the dashboard by moving and resizing each individual tile. By default, the dashboard operates in a locked position to minimize incorrect repositioning of tiles. However, when the user unlocks the dashboard, the tiles can move by dragging on the icon on the upper left corner or resize by dragging on the arrow on the lower right corner.



REFRESH

The dashboard automatically refreshes its data whenever the user views the dashboard, add/edit/remove a tile, or exit a drill-down. However, the user can manually refresh the data by clicking on the refresh button

DOWNLOAD

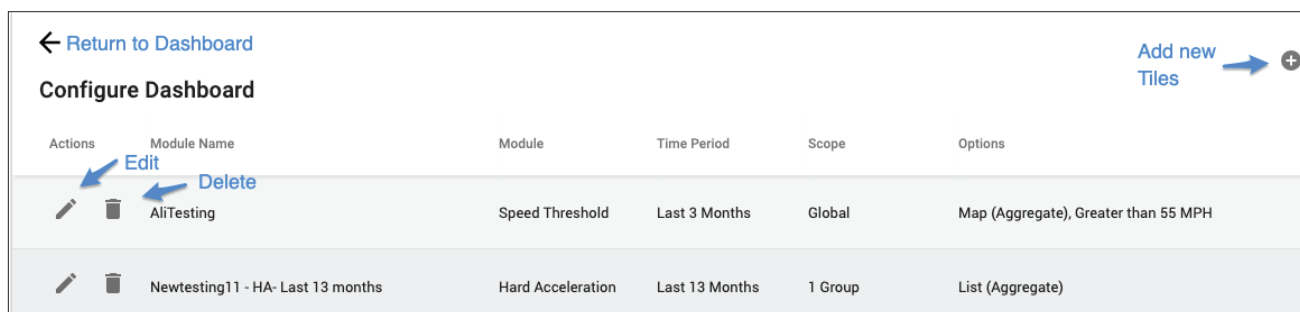
There are two download options provided to the user, to download the entire dashboard as a PDF or download all of the data points in CSV format.

CONFIGURE

The Configuration button is used to add, edit, or delete a tile on the dashboard.

Dashboard Configuration

The dashboard configuration page is used to add, edit, or delete a tile on the dashboard.



Actions	Module Name	Module	Time Period	Scope	Options
	AliTesting	Speed Threshold	Last 3 Months	Global	Map (Aggregate), Greater than 55 MPH
	Newtesting11 - HA- Last 13 months	Hard Acceleration	Last 13 Months	1 Group	List (Aggregate)

EDIT

Edits the following attributes of an existing tile: Module Name, Duration, Assets, Options.

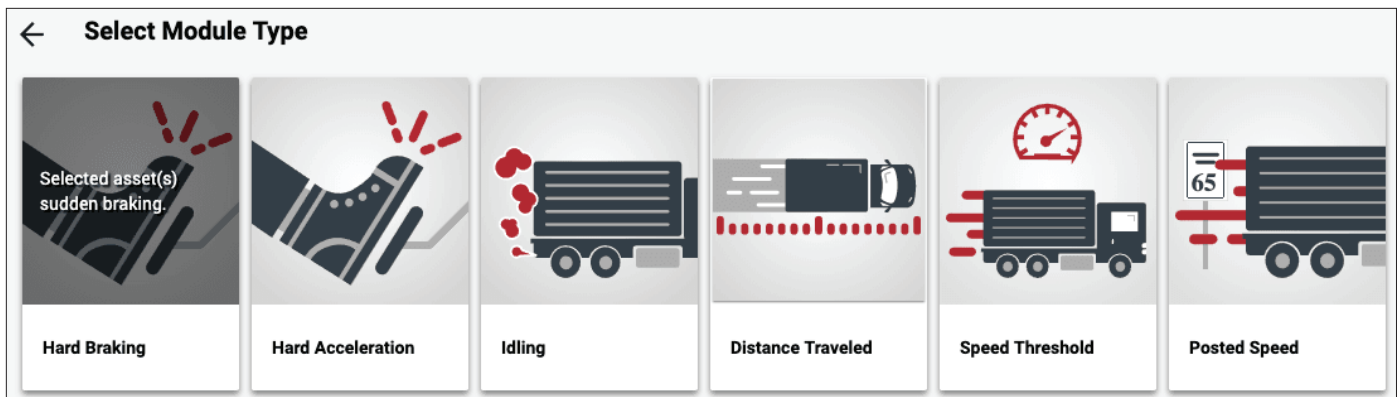
DELETE

Deletes the tile from the dashboard

ADD

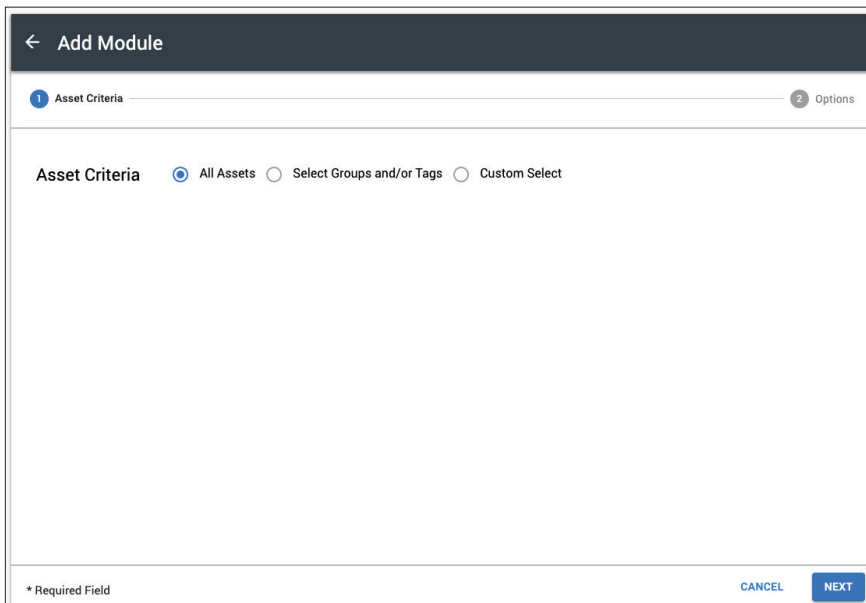
Adds a new tile to the dashboard

Adding or Editing a Tile



SELECTING A MODULE TYPE

Available only when creating a new tile. This allows the user to select the KPI for the new tile.



The screenshot shows a mobile interface titled "Add Module" with a back arrow. It features a progress indicator with two steps: "1 Asset Criteria" and "2 Options". The "Asset Criteria" section contains three radio button options:

- All Assets
- Select Groups and/or Tags
- Custom Select

At the bottom, there is a "* Required Field" label, a "CANCEL" button, and a "NEXT" button.

ASSET CRITERIA

User to select whether the tile will reflect data for all assets, selected groups and/or tags, or custom selections.

← **Add Module**

✓ Asset Criteria
2 Options

Module Name

Show Detail?

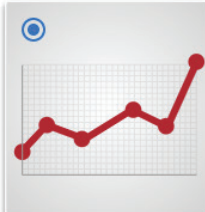
Date Criteria *

Select Date Range


Settings *

Select Speed Threshold

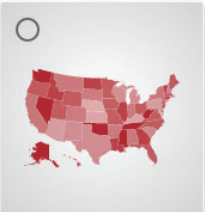
Visualization Type



A line chart visualization. Good for plotting data over time.



A list chart visualization. Shows data in table format.



A map chart visualization. Populate data based on location.

CANCEL
BACK
SAVE

OPTIONS

Module Name: Allows the user to name the tile. If there is another tile with the same name, the dashboard will automatically append COPY(X) at the end of the name, where X equals the number of duplicate names.

Date Criteria: Allows the user to select the date range for this tile.

Yesterday	Last 7 days	Last 30 days	Last Month
Last 3 Months	Last Quarter	Last Year	Last 13 Months

Settings: Settings are available for the Speed Threshold and Posted Speed KPI.

Speed Threshold:		
Greater than 55 MPH	Greater than 60 MPH	Greater than 65 MPH
Greater than 70 MPH	Greater than 75 MPH	Greater than 80 MPH

Posted Speed:

10 MPH over Posted Speed	20 MPH over Posted Speed	30 MPH over Posted Speed
Options: Select either Detail or Aggregate for the Drill-down.		

Conclusion

The dashboard is a solution for visualizing telematics data. The Fleet manager can plot the distance traveled KPI in a trendline to vehicle operation, establish a leaderboard to understand which vehicle has the most idling, or understand which area has the most infractions. By leveraging this data, the fleet manager can better understand fleet performance and make informed business decisions.

Alerts

ALERT TYPES TAB



Types of Alerts visible on the Alert Types tab are the following.

SAFETY ALERTS

Hard Braking & Acceleration Alert

Sends an alert when the selected vehicle(s) stop or accelerate suddenly. The exact measurements for these alerts are determined by the Vehicle Type, as defined for each individual asset when in the asset edit window.

Odd Hours Alert

Sends an alert if the selected asset(s) record an event outside of normal operating hours. Odd hours are set by the user.

Posted Speed Limit Alert

Sends an alert if the selected asset(s) exceeds the maximum posted speed threshold.

Speed Threshold Alert

Sends an alert if the selected asset(s) exceeds a user-set maximum speed threshold.

Unauthorized Movement Alert

Sends an alert if the selected asset(s) record movement without the ignition being on.

PRODUCTIVITY ALERTS

Idle Alert

Sends an alert when the selected asset(s) have been idling more than a set number of minutes.

Stop Alert

Sends an alert when the selected vehicle(s) stop for more than a set number of minutes.

Input Alert

Sends an alert when one of the customer-defined inputs is active or inactive.

Landmark Arrival/Departure Alert

Sends an alert when the selected asset(s) enter or leave the selected landmark(s).

MONITORING ALERTS

Device Power Connect Alert

Sends an alert when the selected device(s) power on after having completely lost power for a period of time.

Device Power Disconnect Alert

Sends an alert when the selected device(s) is no longer receiving external power.

Temperature Alert (only applicable to temperature units)

Sends an alert when inside of selected asset(s) cargo temperature goes past selected temperatures.

Fuel Tank Alert (Applicable to GM OnStar, FL1 and/or FL4 Units only)

Sends an alert when the fuel tank level of selected asset(s) drops below the specified threshold.

ASSET HEALTH ALERTS

DTC Alert (Applicable to Advanced Bundle account with FL OnStar, FL1, and/or FL4 Units Only). Sends an alert if the selected asset(s) experience a diagnostic trouble code.

Low Battery Alert

Sends an alert when the selected asset(s) battery power is lower than 11.6 volts.

Tire Pressure Alert (Applicable to GM OnStar Units only)

Sends alert when the tire pressure of selected asset(s) drops below 20% of the recommended threshold.

Engine Oil Life Alert (Applicable to FL OnStar Units Only)

Sends an alert when engine oil life falls below 20%.

ADDING AN ALERT FROM THE ALERT TYPES TAB

1. Click on the desired alert type you would like to create.
2. Specify Alert Details in step 1 of the wizard.
3. Specify asset criteria in step 2 of the wizard.
4. Specify recipients in step 3 of the wizard.
5. Optionally create an alert schedule, such as to only be alerted in between 6am and 6pm when someone enters or exits a Landmark. Note that this schedule is mandatory for the Odd Hour Alert.
6. Save the alert. (The saved alert will be visible inside the Saved Alerts tab).

ALERTS HISTORY TAB

1. The Alert History loads automatically when the Alerts History Tab is selected.
2. This tab shows all alerts generated by all vehicles on the account, along with the Details, Date/Time, Name, Alert Type, Vehicle, and Location.

3. Refresh the page by clicking refresh.



4. Filter the page by clicking on the filter icon.



5. Show or hide columns by clicking on the eye symbol.



SAVED ALERTS TAB

You can view all saved alerts within the Saved Alerts tab. From here you have the option to perform the following actions:

1. Filter the page by clicking on the filter icon.
2. Edit an alert by clicking on the edit icon to the left of that Alert's row.
3. Delete an alert by clicking on the trash icon to the left of that Alert's row.



Driver Behavior

Please see FleetLocate Driver Behavior user guide [here](#).





Admin

These sections are available under the Admin tab.


Users

When clicking on “Users” within the Admin navigation, all Users within the account are listed. From here, a user can be created or edited.

The following actions can be taken within this page:

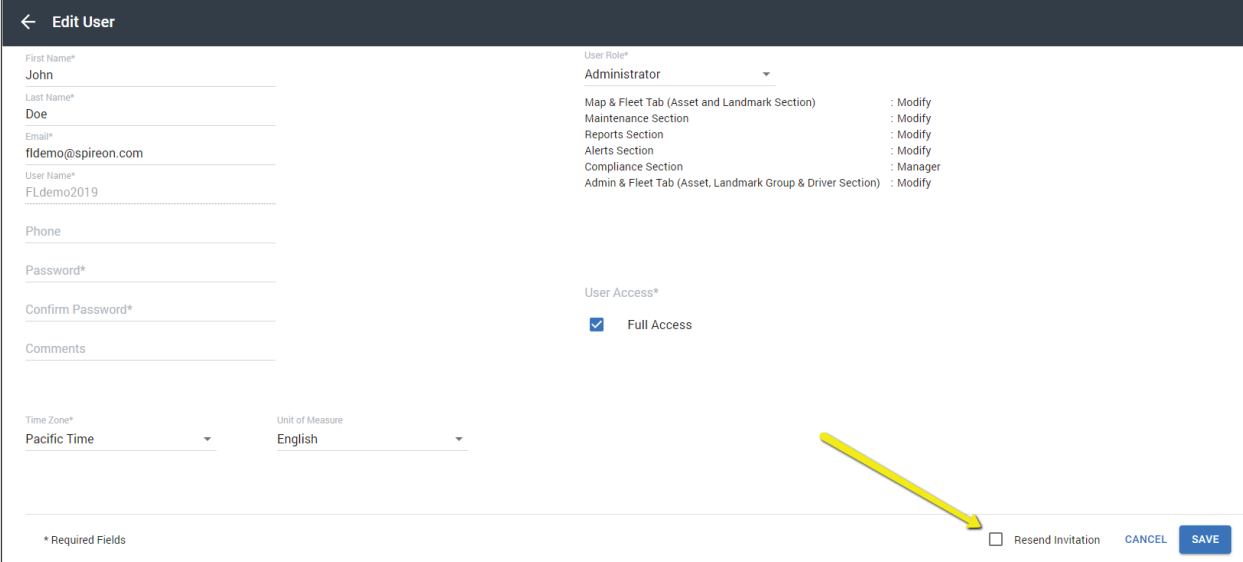
1. Refresh the page by clicking refresh. 
2. Create a new user by clicking on the Add icon. 
3. Show or hide columns in the list view. 
4. Sort each row by clicking on the row header. 
5. Reorder the list items from left to right by dragging and dropping a column.
6. Edit a user by clicking on the edit button to the left of the items row.
7. Search for a user by clicking on the search icon in the top left of the header.

Creating a User

1. Create a new user by clicking on the Add icon. 
2. In the Add User window, fill out the required fields, marked with an *.
3. Fill out the remaining fields and assign a User Access and User Role.
4. Click Save
 - a. Note: Upon clicking SAVE a welcome email will be automatically sent to the email address specified for this user.





Re-sending a Welcome Email to a User

1. Click to edit the user you wish to resend the email invitation to by clicking on the edit button to the left of the items row.
2. Check the “Resend Invitation” checkbox at the bottom right of the edit screen.
3. Upon clicking SAVE a welcome email will be automatically re-sent to the email address specified for this user.




User Roles Tab

The following actions can be taken within this page.

1. Refresh the page by clicking refresh. 
2. Create a new role by clicking on the Add icon. 
3. Show or hide columns in the list view. 
4. Sort each row by clicking on the row header. 
5. Reorder the list items from left to right by dragging and dropping a column.
6. Edit a user by clicking on the edit button to the left of the items row.
7. Search for a role name by clicking on the search icon in the top left of the header.

Adding a User Role

User Role determines what a user can view and/or modify with the vehicles and landmarks they can access.




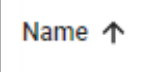
1. Create a new role by clicking on the Add icon. 
2. This opens the Add User Role window.
3. Enter a Name for the User Role.
4. Select a role in the Start From dropdown, or leave the dropdown at [Custom] to create a role from scratch:
 - a. Manager – can Modify the Map, Alerts and Reports sections
 - b. Dispatcher – can Modify the Map and Alerts sections
 - c. Administrator – can Modify all sections
5. Default roles cannot be edited.
6. If you create a role from scratch, there are the following options for each section:
 - a. Select the checkbox of the respective section to allow the end user one of the following options:
 - i. View – allows the user to view the selected section, but they cannot modify any data
 - ii. Modify – allows the user to view and modify data within the selected section.
7. Click Save.

Editing a User Role

1. Edit a user by clicking on the edit button to the left of the items row Select User Roles from the left side.
2. This opens the Edit User Role window.
3. From this window, all elements of the selected User Role can be edited.
4. Click Save

User Access Tab

The following actions can be taken within this page:

1. Refresh the page by clicking refresh. 
2. Create a new access by clicking on the Add icon. 
3. Show or hide columns in the list view. 
4. Sort each row by clicking on the row header. 
5. Reorder the list items from left to right by dragging and dropping a column.
6. Edit a user by clicking on the edit button to the left of the items row.
7. Search for an access name by clicking on the search icon in the top left of the header.

Adding a User Access

User Access determines which vehicles and/or landmarks a user can access.



1. Create a new access by clicking on the Add icon.
2. This opens the Add User Access window.
3. Choose a name for the new User Access.
4. The Vehicles tab lists all vehicles available and can be searched or filtered by group.
5. Use the checkboxes to select any vehicles to be included.
6. Click the right-facing arrow to add those vehicles.
7. The Landmarks tab lists all landmarks available and can be searched or filtered by group.
8. Use the checkboxes to select any landmarks to be included.
9. Click Save.
10. The new User Access will now display in the list and can be assigned to users.

Editing a User Access

1. Select User Access from the page.
2. Edit a user by clicking on the edit button to the left of the items row.
3. This opens the Edit User Access window.
4. From this window, all elements of the selected User Access can be edited.
5. NOTE: If users have this access, then modifying the access will affect the users added to this access. (Example: User A is assigned to Access 1 = 1 vehicle group > Access 1 is now updated to have 2 vehicle groups as part of it. User A will now have access to both vehicle groups).
6. Click Save.






RECIPIENT TAB

The recipient tab allows you to search for an email address or phone number that currently is added to one or more alerts or report notifications. The search reveals easily all of the alerts and reports the recipient is currently added to. You may delete a recipient from the reports or alerts to no longer have him receive any of the alert or report notifications.

NOTE: The alert or report will still be there, but the recipient will no longer receive text or email messages from them if deleted from the recipient tab.




Removing a Recipient

1. Select Recipients from the left, then enter the email address or mobile number of the recipient you wish to remove.
2. Use the Delete icon to remove the email address or mobile number from the recipient list of any listed alerts or reports.

Recipients  @spireon.com X				
Actions	Report/Alert	Created By	Report/Alert Type	Report/Alert Name ↑
	Report	tjbussFL	Alerts	Alerts
	Report	tjbussFL	Alerts	Alerts
	Alert	tjbussFL	Landmark Arrival/Departure AI...	entry 2testLM 

DEVICES TAB

The following actions can be taken within this page:

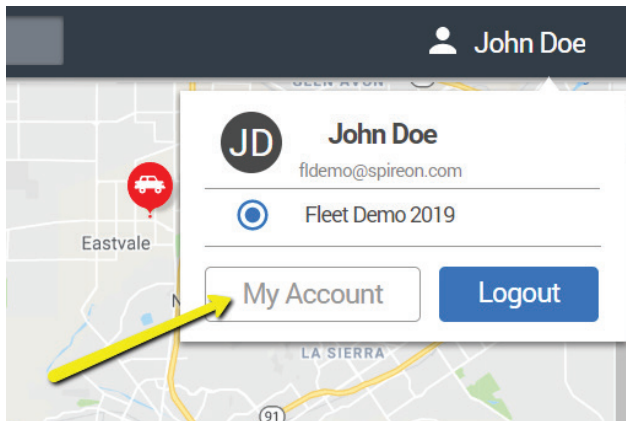
1. Refresh the page by clicking refresh. 
2. Filter the page by clicking on the filter icon. 
3. Show or hide columns in the list view. 
4. Sort each row by clicking on the row header.
5. Reorder the list items from left to right by dragging and dropping a column
 - a. **NOTE: If you wish to pair a device to an asset please do so from the Fleet > Asset Tab.**

Compliance

PLEASE REFER TO FLEETLOCATE COMPLIANCE USER GUIDE [HERE](#).

USER SETTINGS

To access the user settings, click on the My Account button within the drop down.



This action will bring you to the account settings page.

Account Details Tab

- You may update the following info in this tab:
- First Name
- Last Name
- Email Address
- Phone Number

Click the Save Changes button to ensure any updates made are saved.

Application Settings Tab

You may update the following info in this tab:

- Default Login Page
- Time Zone
- Units of Measurement
- Time Display

Click the Save Changes button to ensure any updates made are saved.

Password Tab (Change Password)

On this tab, you may change your password by entering your existing password and creating a new password to use for login. Click the Save Changes button to ensure any updates made are saved.

FORGOT PASSWORD

If you have forgotten your password, please click on the Forgot Password link in the login page. From here you will be prompted to enter your email address on file. A password reset link will be sent to your email address on file so you can reset your password for the application.

FUEL CARD ADD-ON

This add-on is only applicable if you have a subscription to fuel card integration. If you have any questions or are interested in adding Driver ID to your account, please contact your customer service representative.

Adding a Fuel Card to a Vehicle

1. Open the Add Vehicle or Edit Vehicle window within the List > Assets Tab to view the Fuel Card section.
2. Select a Fuel Type from the dropdown. The fuel options are Unleaded or Diesel.
3. Enter the Fuel Tank Capacity (gal), rounded to the nearest whole gallon.
4. Enter the Account #.
5. Enter the Fuel Card number.
6. Click Save.

Fuel Card Reports

Adding fuel cards to your account gives you access to three new reports, located under the Reports tab. These reports can be run via the same process as all other reports on the account.

1. The **Fuel Efficiency** report shows the miles traveled, gallons used, and mpg of the selected vehicle(s) during the specified reporting period.
 - a. A minimum of two fuel card transactions are required for a vehicle to calculate fuel efficiency.
 - b. Fuel card transactions are assumed to fill the tank completely to calculate fuel efficiency.
2. The **Fuel Exception** report shows the number of transactions, number of exceptions, and the most frequent exception of the selected vehicle(s) during the specified reporting period.
3. The **Fuel Transaction Summary** report shows the number of transactions, total fuel cost, average cost per transaction, total gallons, average cost per gallon for the selected vehicle(s) during the specified reporting period.