



FleetWave User Guide: An Introduction to FleetWave (2017 UI)

Level: User Entry Level (Suitable for All)
Document Content Based on Application Release Version: R2.30

Author: Lisa Simpkins, Technical Trainer
Lisa.simpkins@chevinfleet.com



Document ID: TRN-1109-en
Vsn: 02.00
Date: 03/11/2017
DC1





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Purpose

This user guide is a training and support manual for users of the FleetWave 2017 User Interface (UI). The primary purpose of this document is to offer an introduction to the FleetWave product, its core applications, orientation and navigation. Users will be introduced to core product features and will learn how to operate the system.

Audience/ Level

Audience: This user guide is suitable for all FleetWave 2017 UI system users at an introductory level.

Level: User Entry Level (Suitable for All)

Course Learning Objectives

Upon completion of this course, participants will gain a basic knowledge of the following:

- ✓ Getting Started
- ✓ The FleetWave Home Page Dashboard
- ✓ FleetWave Navigation
- ✓ Database Browse
- ✓ Browse Data Add/ Edit/ View (AEV)

This document is available in the English Language. Chevin Fleet Solutions will be happy to discuss options for copies in other languages.

Course Format and Duration

This is a 1-day course with instructor-led, classroom sessions; hands-on practice is encouraged throughout the course. Course content may also be presented as a series of webinars. For more information on formal presentation methods for this content, please contact training.admin@chevinfleet.com



1. Getting Started

Getting Started Learning Objectives

During this section, participants will gain an understanding of the following:

- 1.1. An overview of the FleetWave product.
- 1.2. How to access the FleetWave application
- 1.3. How to launch FleetWave from your web browser.
- 1.4. Login options and features.

1.1. An Overview of the FleetWave Product

- 1.1.1. FleetWave is a web-based enterprise fleet management solution. As such, it can be accessed from anywhere in the world - the only requirement is an internet connection.
- 1.1.2. FleetWave offers a scalable solution ideal for small, large and complex fleets, catering for multi-location; multi-national; multi-company and enterprise fleet management.
- 1.1.3. The FleetWave 2017 UI platform offers a quality “out of the box” customer solution with the capacity to provide configurable, flexible and user definable options for more bespoke enterprise solutions.
- 1.1.4. FleetWave is a “live” system, meaning that all visible data is provided in real time.

1.2. How to Access the FleetWave Application

- 1.2.1. Different companies may provide different solutions for their users to be able to access their FleetWave application. For example:
 - ▶ An application short-cut icon on the user’s desktop using a single sign-on concept (SSO).
 - ▶ An option to launch the application from the computer’s start menu.
 - ▶ Direct access to a web browser so that users can access their FleetWave account from any computer with an internet connection by typing their FleetWave web address (URL) into their browser search bar.
- 1.2.2. FleetWave is multi-browser compatible and will run in all major browsers:
 - ▶ Microsoft Internet Explorer
 - ▶ Microsoft Edge
 - ▶ Google Chrome
 - ▶ Apple Safari
 - ▶ Mozilla Firefox



1.3. How to launch FleetWave from your web browser

1.3.1. Click to launch your preferred internet browser service; in this example, we are using Microsoft Edge:

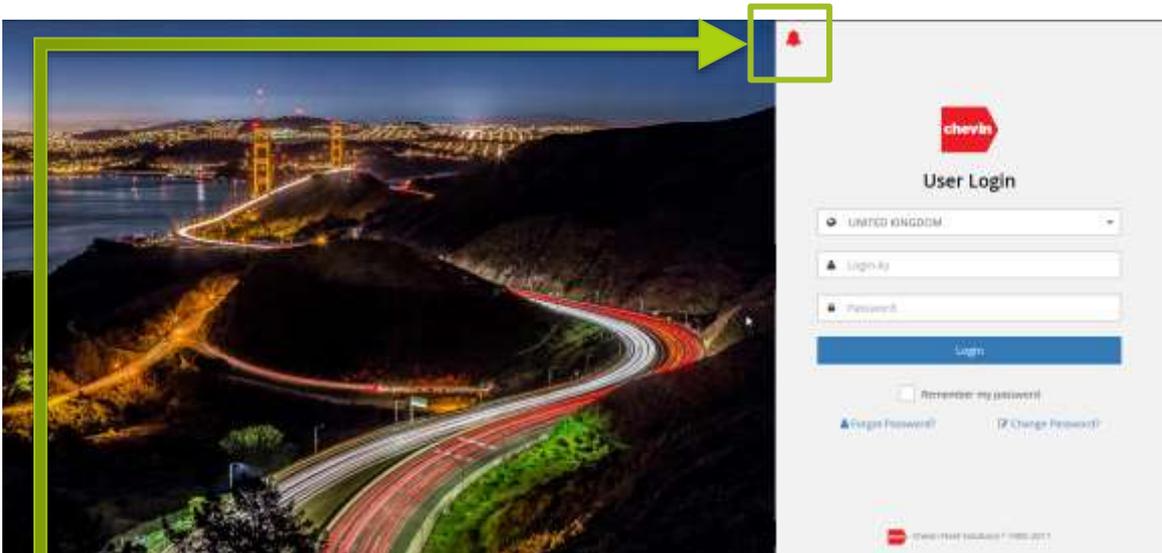


1.3.2. Type the **URL** for your application in the browser search bar and click “search” or hit “enter”:



Your IT department or your FleetWave account manager can provide URL information.

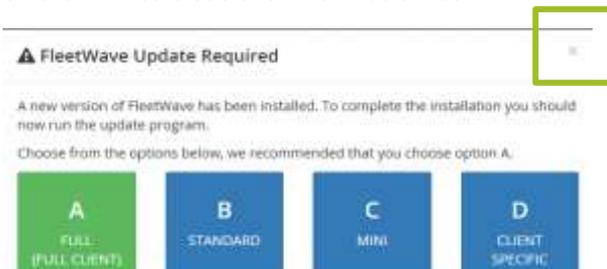
1.3.3. FleetWave launches the login page:



- ▶ Images presented to the left of the login feature can be customized for your business.
- ▶ The bell icon feature to the top left of the Login feature indicates that action may be required to update your application.



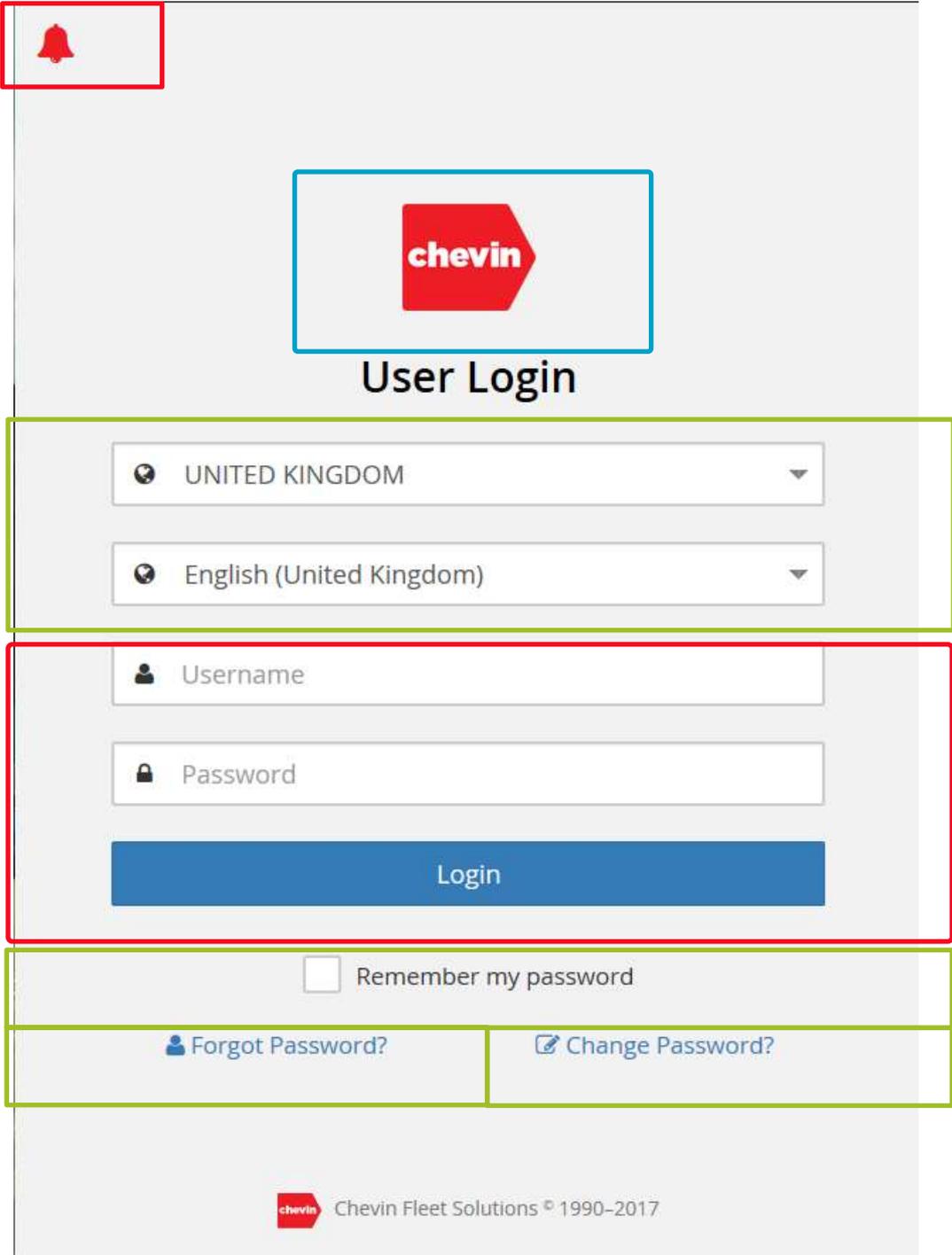
- ▶ Clicking on the bell icon will reveal details of any actions required. Select the appropriate action or click “x” to close the information box.



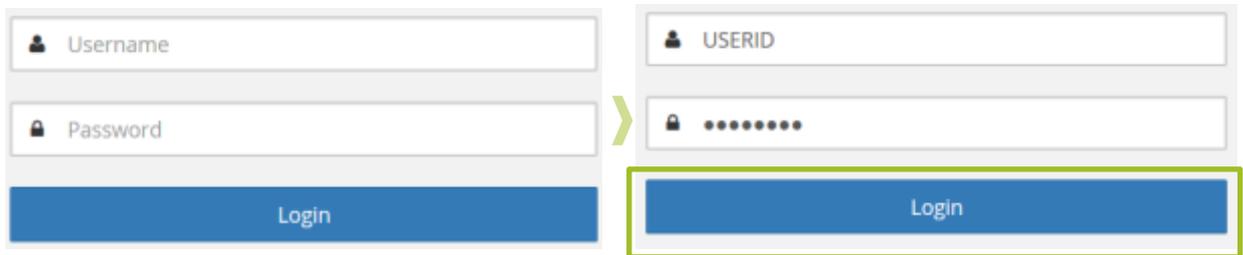


1.4. Login Options and Features

1.4.1. For those users logging into the application directly from a web browser, the FleetWave login feature may be configured and presented in different ways; in the below example of a FleetWave login screen, features circled in red are standard to all applications, features circled in green are generated as a result of optional configuration, features circled in blue are standard but customizable. Optional and customizable features can be managed directly by user administrators:



1.4.2. To log into your FleetWave application, simply type your USER ID in the “Username” box, enter your password and click “Login”:

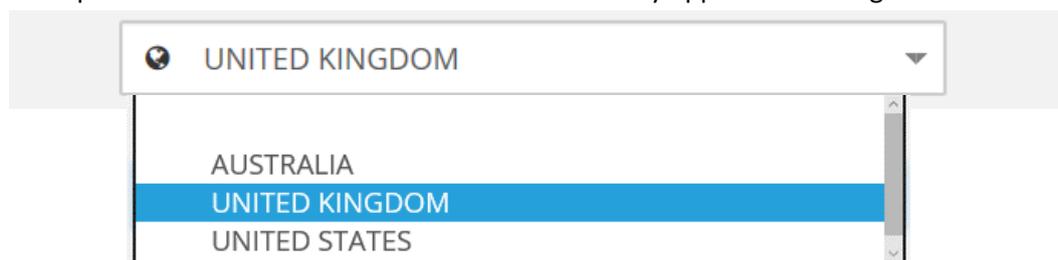


1.4.3. This section defines the purpose and use of other standard and optional features of the login screen:

► **Culture:**



- ✓ This is an optional login feature which allows users to select a business location for application login. The country/location selected will adjust the culture of your FleetWave application displays. Culture determines, for example, date and currency formats. For applications where culture selection at point of login is not possible, culture may be hard coded at a user level by your system administrator.
- ✓ To apply a login culture, simply click to reveal the list of available options and select the appropriate culture from the drop-down list.
- ✓ The options available within the list are determined by application configuration.





► **Language:**

- ✓ This option allows you to select a language in which to launch your FleetWave application. The available language settings are determined by application configuration.
- ✓ The language setting determines not only the translation of text but also the translation of number formats; for example, decimal number separators can either be a decimal point or a comma separator.
- ✓ Both textual and numeric translations are tailored to the specific needs of your company.
- ✓ To apply a login language, simply click to reveal the list of available languages and select the appropriate language from the drop-down list.

► **Username:**

- ✓ This is where you enter your User ID for login.
- ✓ Your User ID will be provided to you by your company administrator.

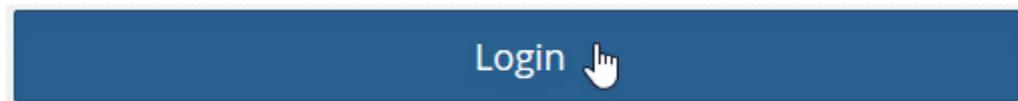
▶ **Password:**



- ✓ This is where you enter your password for login.
- ✓ Your company administrator should supply you with an initial password which needs to be changed at first point of login.
- ✓ It's possible that your company may establish rules that will force you to change your password on a regular basis. For further information, please speak to your system administrator.
- ✓ When you enter your password, FleetWave applies encryption and you will see a hidden character string "●●●●●●●●" instead of your password value.

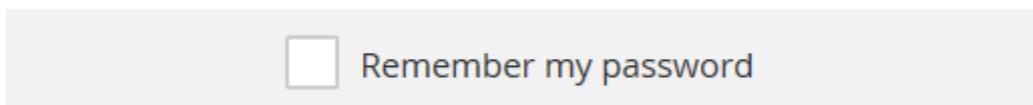


▶ **Login:**



- ✓ Click here to Login.

▶ **Remember My Password:**



- ✓ If you select this tick box when you log in, each time you re-launch the login page and enter your user name, the password field will populate automatically. This is an optional feature.





► **Change Password?**



- ✓ This link allows you to make elective changes to your user password.
- ✓ Clicking on the “Change Password?” link opens the “Change Password” pop-up feature.

- ✓ To change your password, type your user ID and current password into fields 1 & 2 as usual, then enter your new password into field 3 and confirm your new password by entering it again into field 4. Then click “Change Password”; the system will log you in using your new password and your new password applies from this point forward.

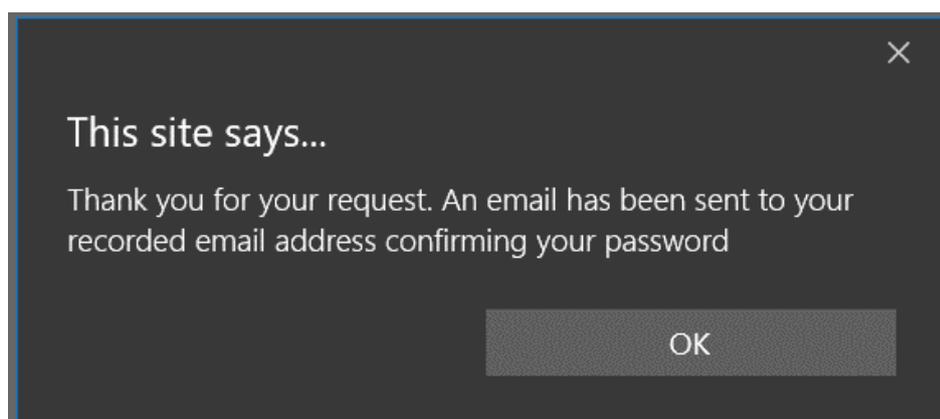
NOTE: A password policy may be applied to your FleetWave application, limiting or restricting the length and character usage for new passwords. If your new password does not meet password policy criteria, FleetWave will prompt you.



▶ **Forgot Password?**



- ✓ If you forget your password, you can use the “Forgot Password?” link.
- ✓ For this link to work correctly there are 2 specific criteria:
 - Firstly, you must enter your user ID in the “Username” field. If your user ID is missing when you click on the link, the below message is displayed. Click “OK” to close.
 - Secondly, as part of the “Forgot Password?” process, FleetWave will attempt to send you an e-mail. For an e-mail to be triggered correctly, your system administrator must first have configured your e-mail address in your user account. If you attempt to use the “Forgot Password?” link and you fail to receive an automated email communication, please contact your system administrator.
- ✓ If you follow the “Forgot Password?” link correctly, you will receive the below notification...click “OK”.



- If your email address is correctly configured, you should receive a message into your inbox that appears very similar to the one below; whereby your username will be logged against your “User ID” and your current password will be noted against the “Password”:

TO: training.admin@chevinfleet.com
FROM: noreply@chevincomputers.com
SUBJECT: FleetWave Password Reminder

FleetWave Password Reminder

User ID : TESTUSER

Password : admin

You will be asked to change your password when you next login

- ✓ The next time you log in, you must use your current password (as specified in the “forgot password” email) but when you click “Login”, FleetWave will enforce a password change and present you with the “Change Password” screen. Please refer to the [Change Password? Feature](#).
- ✓ We suggest that your new password should differ from your old password. It’s possible that your company may apply some password restrictions. In such cases, if you attempt to log in by creating the same password again, you may receive an error message similar to the below:

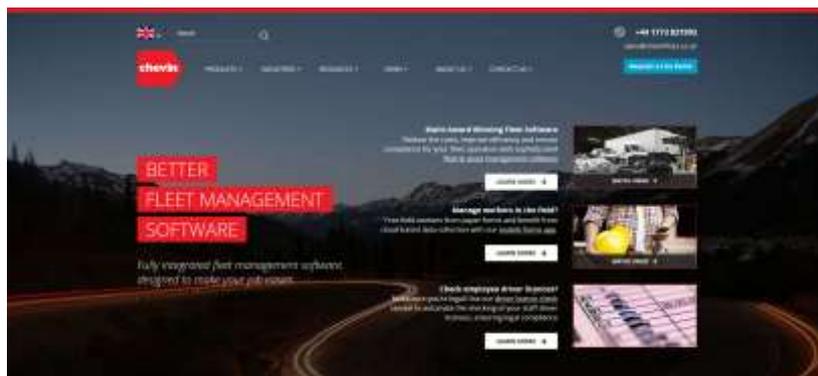
Password cannot match any password entered the last 4 times

- ✓ Change your password and click “Login”. You will be logged into the system with your new password.
- ✓ The Next time you come to log into the system, your new password will apply.

▶ **Chevinfleet.com:**

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- ✓ Click on the Red Chevin logo in the login footer to launch the www.chevinfleet.com home page in a new window:





2. The FleetWave Home Page (Dashboard)

Home Page (Dashboard) Learning Objectives

During this section, participants will gain an understanding of the following:

- 2.1. Home page features.
- 2.2. The Left Menu
- 2.3. FleetWave™ Navigation

2.1. About the FleetWave Home Page

2.1.1. The primary purpose of the Home Page is to provide a system dashboard area from which all other areas of the system may be accessed.

2.1.2. Most elements of the home page can be controlled through access permissions; therefore, different users may see different versions of the same home page.

2.1.3. Below is an example of a FleetWave Home Page:



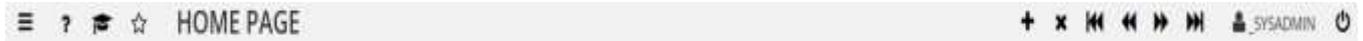
2.1.4. The Home Page consists of the following parts:

- ▶ A Top Bar
- ▶ A Left Menu (or Main Menu)
- ▶ A Message Board
- ▶ Operational Charts and Tables (KPIs)
- ▶ Key Performance Indicators (Fleet Status KPIs)
- ▶ A Dashboard Options Menu

We'll look at each of these in a little more detail



2.2. The Top Bar



2.2.1. The top bar is always visible as you navigate through your FleetWave application.

2.2.2. It holds a series of button-like links that allow us to navigate the system or to activate system features.

2.2.3. Top Bar Features:

Feature	Feature Name	Feature Description
	Menu Toggle Button	Click to set the left menu open or closed.
	FleetWave Help	Click to launch the FleetWave Help pages.
	Academy Icon	Click to launch Chevin Academy and access training content.
	Favourites	From any FleetWave screen click the “Favourites” icon to add a link to that screen to your “Favourites” Menu. Screens added to favourites will display the “Favourites” feature icon “filled”:
HOME PAGE	Your FleetWave Location	This will indicate your current FleetWave location as you navigate around your application.
	Add, Archive & Delete Features	From the home page, clicking “+” launches the KPI Chart Wizard. In Data Browse Screens: Click “+” to add a new record. Click “x” to archive or delete a record.
	Page Navigation Features	In data browse screens, use these features to navigate through pages or records.
_SYSADMIN	Username	This is the logged in user name.
	Log Out	Click to log out of your FleetWave application.



2.3. The Left Menu

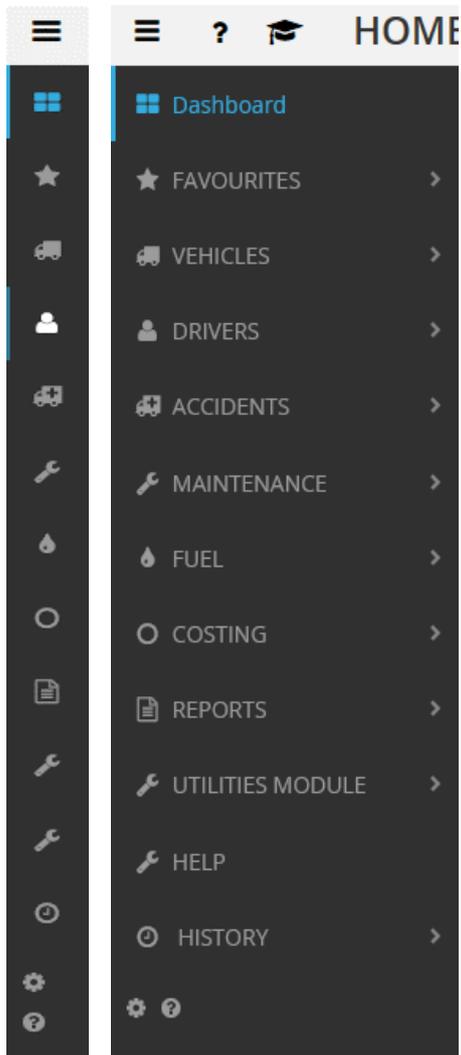


Figure 1 Figure 2

2.3.1. The left menu (or main menu) is the primary FleetWave Navigation Tool. It remains accessible from all FleetWave screens.

2.3.2. When you first log into your FleetWave Application, the Left menu is collapsed and you will see a narrow column of menu icons as in [Figure 1](#).

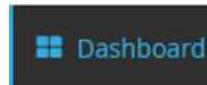
2.3.3. Hovering over the left menu will expand the menu automatically.

2.3.4. Clicking on the menu toggle button in the top bar will set the left menu to a permanently open position as in [Figure 2](#). Click the same button to collapse the menu again.



menu toggle button

2.3.5. At the top of the menu, is a “Dashboard” link. Click here to return to the FleetWave home page at any time.



2.3.6. The left menu features a “Favourites” menu. Users can autonomously add their most frequently accessed system areas to their “Favourites” menu.



2.3.7. The left menu provides navigation links to FleetWave tables tools and reports. Primary links, including “Favourites” are presented as parent menu items. Click on the arrows to the right of each parent to reveal sub-menu structures. Modular menu areas may be sub-categorised into Tools and Settings. Please also refer to [FleetWave Navigation](#)

2.4. The Message Board

2.4.1. The message board displays information and/or messages that your business requires you to see.

2.4.2. Different messages may be targeted at different users.

2.4.3. Below is an example of a home page message board.





2.5. Operational Charts and Tables (KPIs)

- 2.5.1. Your business may wish you to see a level of graphical reporting on your home page dashboard.
- 2.5.2. This type of report information can be represented with different chart styles or in the format of a list, a pivot or a number grid.
- 2.5.3. Users will only see reports that they have been given permission to see, allowing for customisation across different sectors of the business.
- 2.5.4. Users with the appropriate permissions may be able to drill into home page charts and tables. We will look at this in more detail under [FleetWave Navigation](#)
- 2.5.5. Users with the appropriate permissions may also be able to create their own home page reports. There are user guides available for FleetWave reporting features.
- 2.5.6. Below are some examples of home page reports:





2.6. Key Performance Indicators (Fleet Status KPIs)

FLEET STATUS ⚙️ ↻			
COSTCENTRE	<input type="text"/>	<input type="button" value="SELECT"/>	
DRIVER EYE TEST DUE	2	2	2
DRIVER OFFENCE POINTS	0	2	1
DEFECTS BY SEVERITY	0	4	1
DRIVER MEDICAL DUE	2	2	3
NEXT SERVICE DATE	0	0	3
TAX DATE	0	0	7
DRIVER LICENCE CHECKS DUE	1	1	2
MOT DATE	0	0	8

2.6.1. Fleet status KPIs are located in the top right corner of the home page screen.

2.6.2. One standard definition of a key performance indicator (KPI) is a measurable value that demonstrates how effectively a company is achieving key business objectives.

2.6.3. FleetWave KPIs support this standard concept with a visual traffic light system which offers users an actionable scorecard for keeping business strategies on track. KPI boundaries are defined according to business needs in terms of:

- ▶ Green Action will be needed in the future but no immediate need for action or concern (left hand column)
- ▶ Yellow Will need action or attention very soon (centre column)
- ▶ Red Needs urgent action or attention (right hand column)

The boundaries for each of the Green, Yellow and Red outputs are determined and defined by customer specific goals. Customer report administrators can manage this directly or Chevin will be happy to support change requests for the creation and management of Fleet Status KPIs.

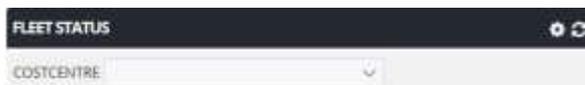
Not all KPIs must have a green, yellow and red result, it is possible to create and display a KPI report using just a single colour output or using any combination of the available colour indicators.



2.6.4. KPIs may be filtered by one of many business hierarchy categories, the standard filter options are:

- ▶ Cost Centre
- ▶ Depot/ Workshop
- ▶ Department
- ▶ Location
- ▶ Suppliers
- ▶ Country
- ▶ Company

2.6.5. The filter may be configured differently for different users or user groups and may be represented as a drop-down value list or a multi-choice filter. In the below example, a user has been assigned a “Costcentre” filter. The below examples represent both filter formats:



Drop-down value list



Multi-choice filter

2.6.6. Some users may not require a filter on their fleet status tool at all because their data permissions already lock them down to visibility of appropriate content. FleetWave configuration is flexible enough to facilitate a different view of the Fleet Status Tool according to user requirements.

2.6.7. Users with the appropriate access rights may use Fleet Status KPIs to navigate to filtered database tables; we will look at this under [FleetWave Navigation](#)

2.6.8. Applying a filter will auto-adjust fleet status KPI output values relevant to that filter. In the below example, [Figure 3](#) shows an unfiltered view of the fleet status KPIs and [Figure 4](#) shows a filtered view for Costcentre “CHEVIN FLEET SOLUTIONS BVBA LTD”, note how some of the KPI output values have changed as a result of the filter:



Figure 3

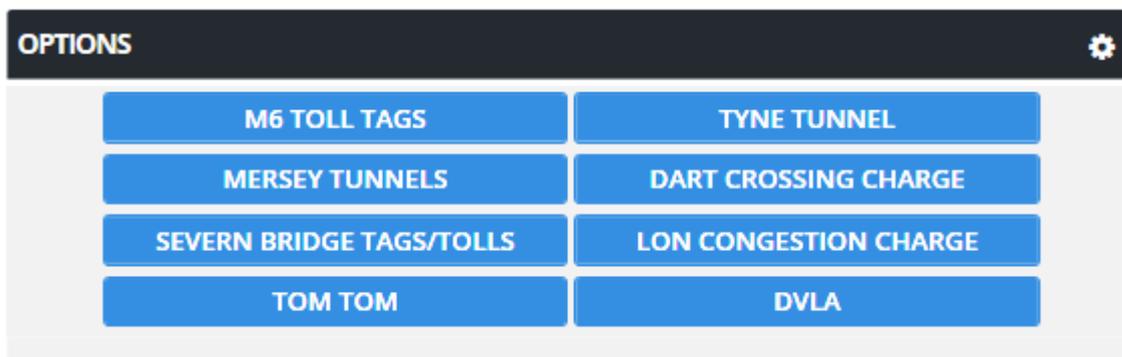


Figure 4



2.7. The Dashboard Options Menu

- 2.7.1.** The FleetWave dashboard options menu provides an additional menu area on the home page that can be used to create a menu of navigational links to any URL.
- 2.7.2.** We recommend that this menu is reserved for useful links that navigate to web sites or pages external to the FleetWave application. This avoids cluttering the main internal system menu structure. However, internal system links are also possible here.
- 2.7.3.** External links should be configured to open in a new browser window to avoid disruption of FleetWave workflow.
- 2.7.4.** Click on a link to open or navigate to a destination.
- 2.7.5.** For example, companies may use this menu area to link to external websites that they regularly use to manage aspects of their fleet, such as, but not limited to:
- ▶ Websites for managing tolls and charges
 - ▶ Websites for managing licence checks
 - ▶ Websites for sat nav and telematics providers
 - ▶ Websites for external customers and suppliers
- 2.7.6.** Below are some example menu links frequently used in UK applications:



- 2.7.7.** Click on a link to open or navigate to a destination.
- 2.7.8.** If your business doesn't require external links in this way, the dashboard options menu can be turned off; in which case, it will not be visible on your home page dashboard.

3. FleetWave Navigation

Navigation Learning Objectives

During this section, participants will gain an understanding of the following:

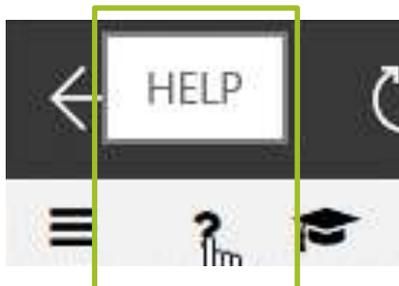
- 3.1. Top bar navigation tools
- 3.2. How to navigate using the left menu
- 3.3. How to navigate home page charts
- 3.4. How to navigate to a filtered data set using fleet status KPIs
- 3.5. How to navigate using the dashboard options menu

3.1. Top Bar Navigation Tools

3.1.1. Overview



- ▶ The FleetWave top bar is accessible from all areas of your application.
- ▶ There are several features available within your FleetWave top bar. If you hover over any one of these, a screen tooltip appears to define the feature.





3.1.2. How to Freeze and Unfreeze the Left Menu

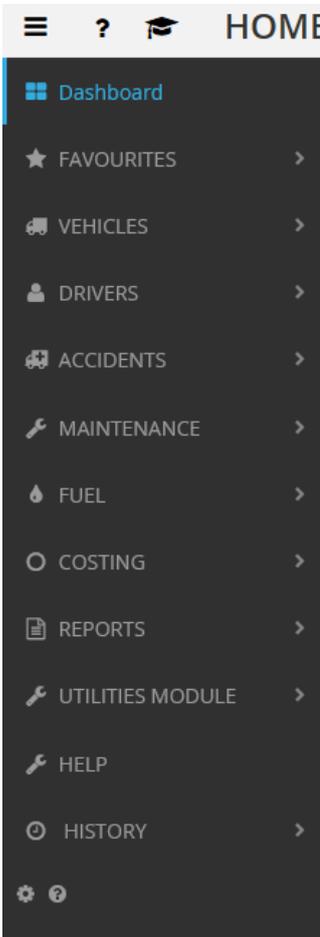
- ▶ We saw earlier that when we first log in to our FleetWave application, our left menu is collapsed and only the menu icons are visible.
- ▶ Hovering over the left menu, dynamically expands the menu to allow menu navigation.
- ▶ When your mouse cursor is moved away from the left menu, it dynamically collapses again.
- ▶ If you prefer to freeze your left menu in its expanded position, you can do so using the menu toggle button. This is permanently visible in the FleetWave top bar:



- ✓ Click once to expand and freeze the left menu frame
- ✓ Click a second time to return your left menu to its default behaviour.



Collapsed



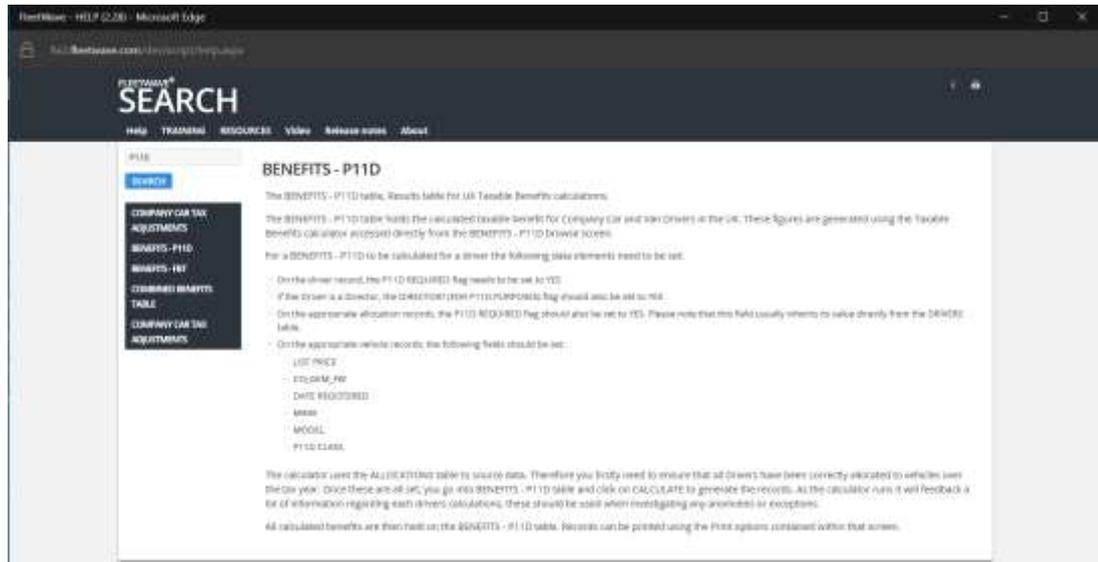
Expanded



3.1.3. FleetWave Help



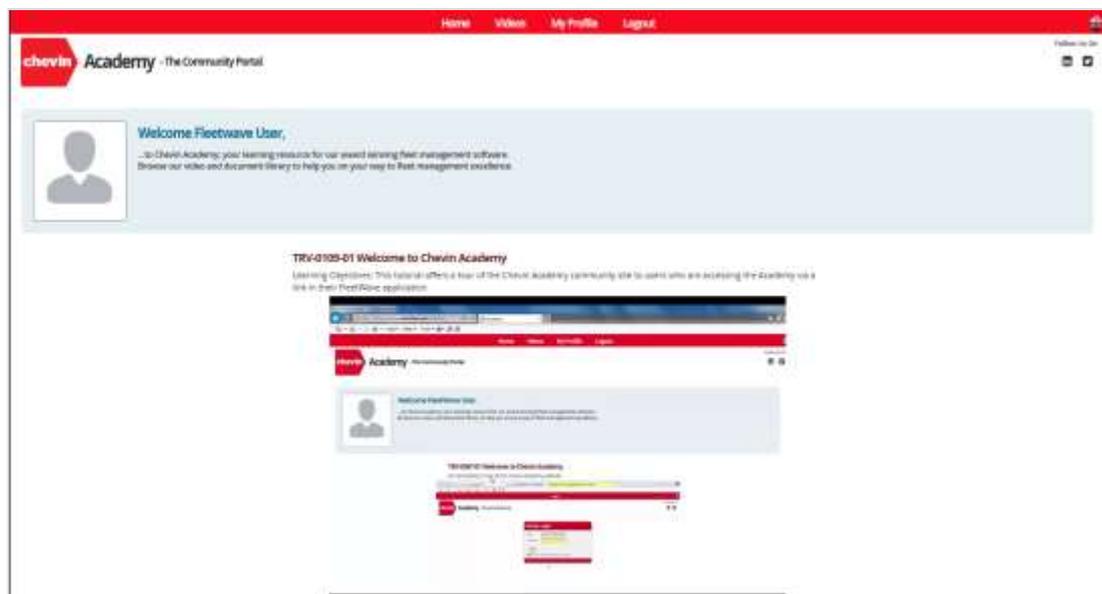
- ▶ Clicking on the “help” feature in your FleetWave top bar opens the FleetWave help pages.
- ▶ Search for content, e.g. “P11D” for help with a feature.



3.1.4. Chevin Academy



- ▶ Click on the academy icon to launch the Chevin Academy community portal.
- ▶ Chevin Academy is your FleetWave community learning resource. There are over 100 training videos available on the Academy site today. Training content is being supplemented to the Academy environment regularly.





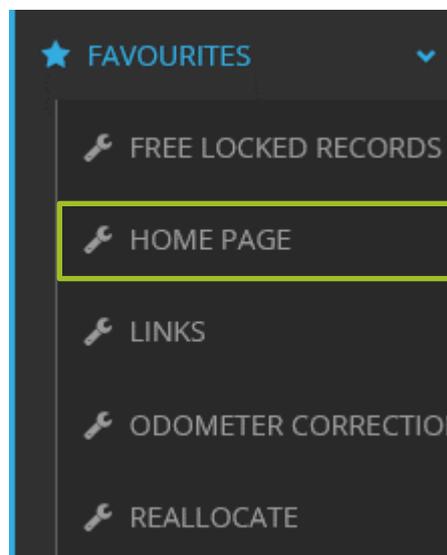
3.1.5. Favourites Feature



- ▶ From any FleetWave screen, users may customise the menu links available within their “Favourites” list by clicking on the “Favourites” feature icon in the top bar.
- ▶ Once selected:
 - ✓ The feature icon background colour appears “filled”:



- ✓ A link to that screen is added alphabetically to the user’s “Favourites” menu list in the FleetWave left menu panel:



- ▶ Likewise, users may remove menu items from their favourites as follows:
 - ✓ Click the favourites menu item to navigate to the linked screen
 - ✓ De-select the “Favourites” feature icon in the top bar
 - ✓ Once de-selected, the icon appears without a background fill again
 - ✓ The menu item is removed from under the “Favourites” list in the left menu panel.

3.1.6. FleetWave Location



- ▶ As you move around your FleetWave application, your system location is displayed in the top bar.



3.1.7. Data Management Features



- ▶ To the right of the top bar is a series of data management features:
- ▶ Please note that, whilst all top bar data management features are visible from all areas of the system, including the FleetWave home page, they may not all have an applicable use within all system areas.
- ▶ Additionally, some of these features may be access controlled; they may be visible, but you may not have permissions to use them. When this is the case, nothing will happen when you click on a feature link.
- ▶ Below is a brief description of each feature, we will look at some of these in more detail later:
 - ✓  **ADD** - In data browse screens, this feature allows users with the appropriate permissions to add a new data record into a data browse table or, from the FleetWave home page, click this link to launch the KPI chart wizard.
 - ✓  **DELETE** - In data browse screens, this feature allows users with the appropriate permissions to archive and/or delete data records or reports.
 - ✓  **PAGE FIRST** - In data browse screens where page numbers are visible in the top bar, use this button to move to the first page of data records.
 - ✓  **PAGE BACK** - In data browse screens where page numbers are visible in the top bar, use this button to move to the previous page. When is data record view mode, use this link to scroll back to the previous record in view mode.
 - ✓  **PAGE NEXT** - In data browse screens where page numbers are visible in the top bar, use this button to move to the next page. When is data record view mode, use this link to scroll back to the previous record in view mode.
 - ✓  **PAGE LAST** - In data browse screens where page numbers are visible in the top bar, use this button to move to the last page.

3.1.8. Data Page Number Navigation

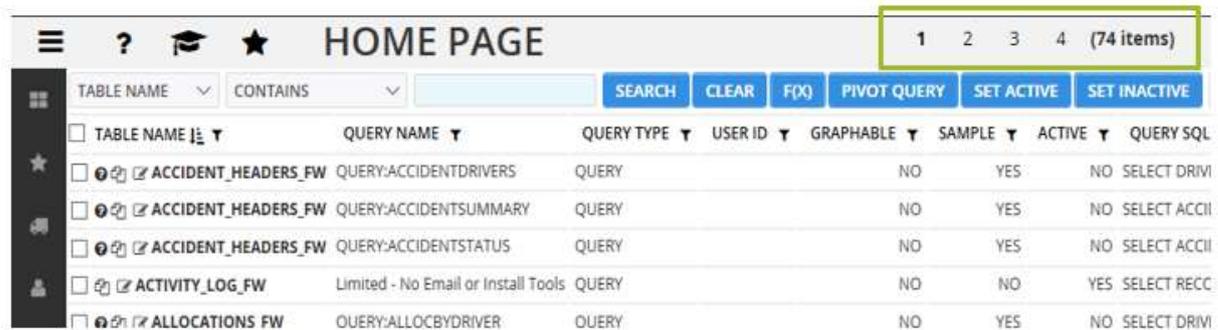


TABLE NAME	CONTAINS	SEARCH	CLEAR	FQ	PIVOT QUERY	SET ACTIVE	SET INACTIVE
TABLE NAME	QUERY NAME	QUERY TYPE	USER ID	GRAPHABLE	SAMPLE	ACTIVE	QUERY SQL
ACCIDENT_HEADERS_FW	QUERY:ACCIDENTDRIVERS	QUERY		NO	YES	NO	SELECT DRIV
ACCIDENT_HEADERS_FW	QUERY:ACCIDENTSUMMARY	QUERY		NO	YES	NO	SELECT ACCII
ACCIDENT_HEADERS_FW	QUERY:ACCIDENTSTATUS	QUERY		NO	YES	NO	SELECT ACCII
ACTIVITY_LOG_FW	Limited - No Email or Install Tools	QUERY		NO	NO	YES	SELECT RECC
ALLOCATIONS FW	OUERY:ALLOCCBYDRIVER	OUERY		NO	YES	NO	SELECT DRIV

- ▶ When in a data browse table, if many records exist such that all records cannot be displayed on one page, FleetWave will render page numbers in the top bar along with a total count of records.
- ▶ Rendered page numbers are navigable within the top bar; click on a page number to move to that page.

3.1.9. Login/ Logout Features

- ▶ FleetWave displays login and logout features to the right of the top bar:

✓  **_SYSADMIN** **Username** – this is the logged in username

✓  **Logout** – Click here to log out of your FleetWave application.

3.1.10. Chevin Administration Features



- ▶ When logged into a FleetWave application as a Chevin internal user, you are granted super administration rights. The following additional features are made available in the top bar:

✓  **Academy back end access** – a secondary academy icon is rendered; this gives access to community-dev from DEV applications and community-test from TEST applications. Community-dev requires security login with an HQ network account.

✓  **Chevin FleetWave Install Wizard** – click this feature to launch the install wizard. Guidance on the use of this feature is available to Chevin staff independently.

✓  **Chevin Diagnostics Tool** – click to run application diagnostics.

NOTE: Non-Chevin users will never see these features



3.2. How to Navigate Using the Left Menu

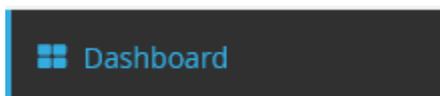
3.2.1. The left menu is the primary FleetWave navigation tool and is accessible from all FleetWave screens. Left menu links allow you to move to various parts of your FleetWave application, including:

- ▶ Data Tables
- ▶ Reports
- ▶ Tools
- ▶ Settings (configuration areas)

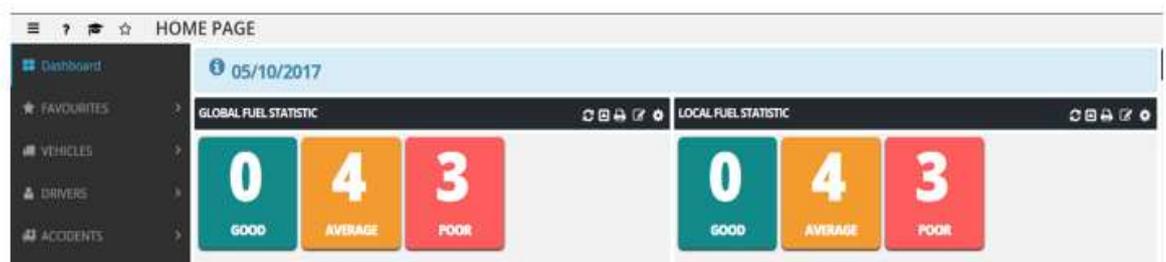
3.2.2. There are 5 distinct component areas to the left menu:

- ▶ Dashboard
- ▶ Favourites
- ▶ Main Menu Modular Navigation
- ▶ Browse History
- ▶ System Administrator Tools

3.2.3. Dashboard

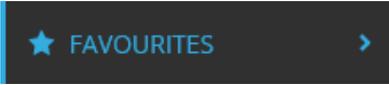


- ▶ This is your left menu link to the FleetWave home page dashboard. Click this link to return to your home page at any time.
- ▶ Each time this link is clicked, data on the home page dashboard is refreshed.

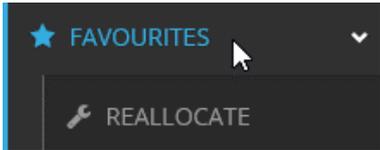




3.2.4. Favourites



- ▶ The Favourites menu can be expanded to reveal sub menu areas. Click anywhere on favourites to expand the menu:



- ✓ Expanded menus display sub menu items in a position that hangs slightly to the right of the parent menu item.
 - ✓ In the above favourites list we are displaying the FleetWave reallocation tool.
 - ✓ Favourite menu items will differ for each user; these can be configured by your system administrator.
- ▶ The favourites section is reserved for links to system areas that users need to access regularly but are not immediately visible as parent or main menu items under modular navigation links.
 - ▶ Your application will be pre-configured with a number of menu options under “FAVOURITES” but users may control which menu items appear under their favourites list using the “Favourites” feature in the FleetWave top bar.
 - ▶ To navigate to any system area or feature available in your “FAVOURITES” list, simply click on that menu item; in our example, clicking on “Reallocate” opens the FleetWave reallocation tool:



The screenshot shows the 'Reallocate @ Fleet' form with two tabs: 'Reallocate @ Fleet' (active) and 'Populate vehicle'. The form contains several input fields and sections:

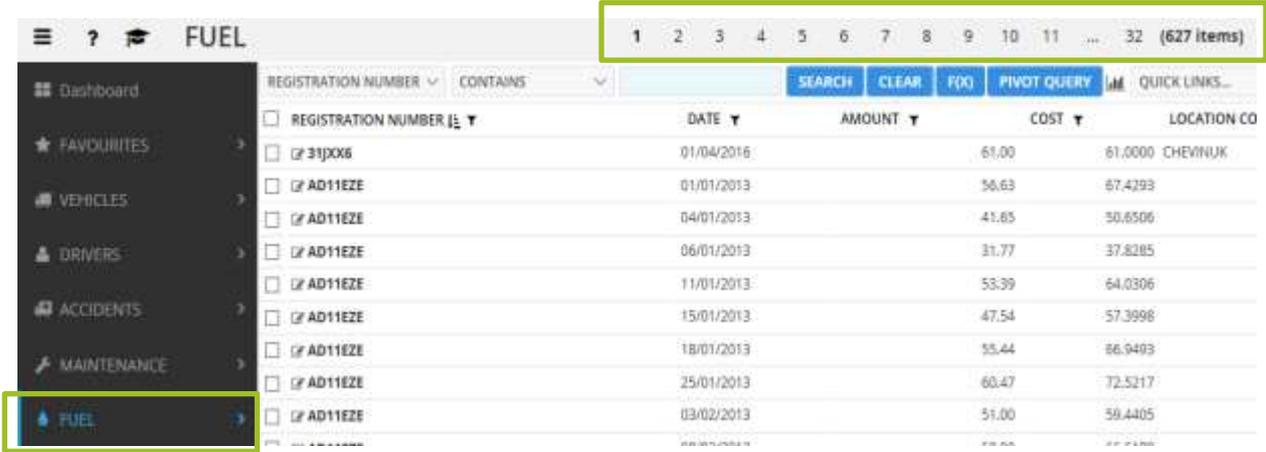
- DRIVER NAME:** Input field with a search icon.
- REGISTRATION NUMBER:** Input field with a search icon.
- DIAGNOSTIC:** Input field with a search icon.
- MAKE:** Input field.
- VEHICLE STATE:** Input field.
- COSTCENTRE:** Input field.
- MODEL:** Input field.
- REGISTRATION NUMBER:** Input field with a search icon.
- DIAGNOSTIC:** Input field with a search icon.
- PREVIOUS DATE:** Input field with a calendar icon.
- START DATE:** Input field with a calendar icon.
- NEW COSTCENTRE:** Input field with a dropdown arrow.
- ALLOCATION REASON:** Input field with a dropdown arrow.
- COMMENTS:** Text area.

At the bottom of the form are 'SAVE' and 'CANCEL' buttons.

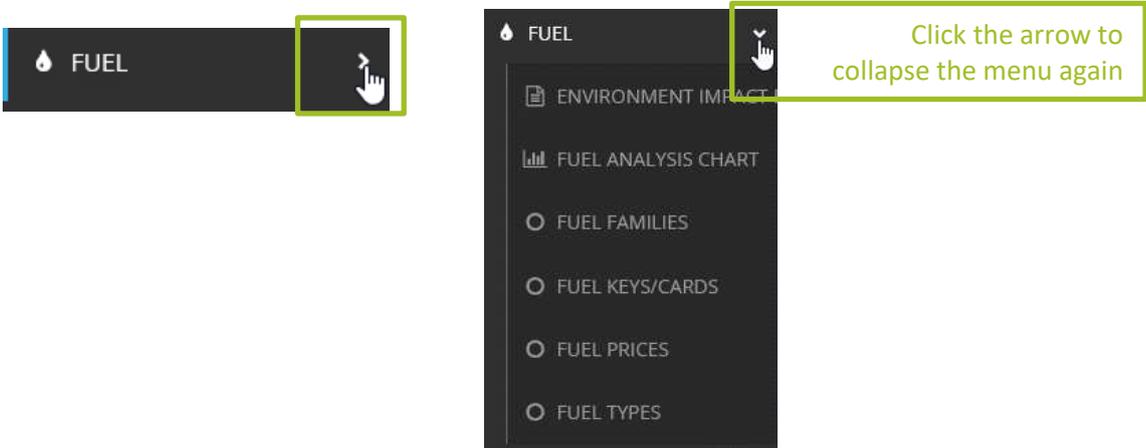


3.2.5. Main Menu Modular Navigation

- ▶ This section refers to all parent menu items available under “FAVOURITES” and above “HISTORY”. Parent menu items are generally defined as the primary data table for a FleetWave database module.
 - ✓ Clicking on a primary modular link will take you to the primary data table for that module.
 - ✓ In the below example, we have selected FUEL and FleetWave has opened the Fuel transaction table (FUEL_ISSUES_FW). Notice the navigable page numbers and record count in the top bar.

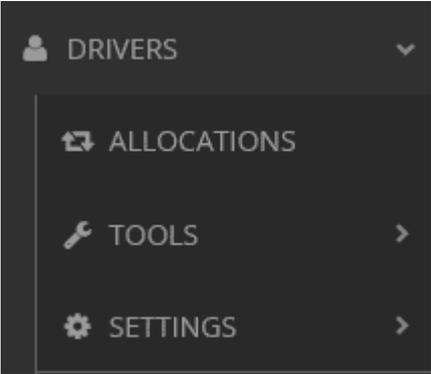


- ▶ Modular navigation links are access controlled according to the needs of the logged in user. As such, each user may have a very different menu view.
- ▶ Each database module may be made up on many data tables, tools or configuration tables. All critical secondary tables, tertiary tables, configuration tables and tools for each module are also accessible from the left menu as sub menu items to the modular parent.
- ▶ To expand a modular parent menu to reveal sub menu items, click on the arrow to the right of the parent menu item, then click on a menu item to navigate to that feature:

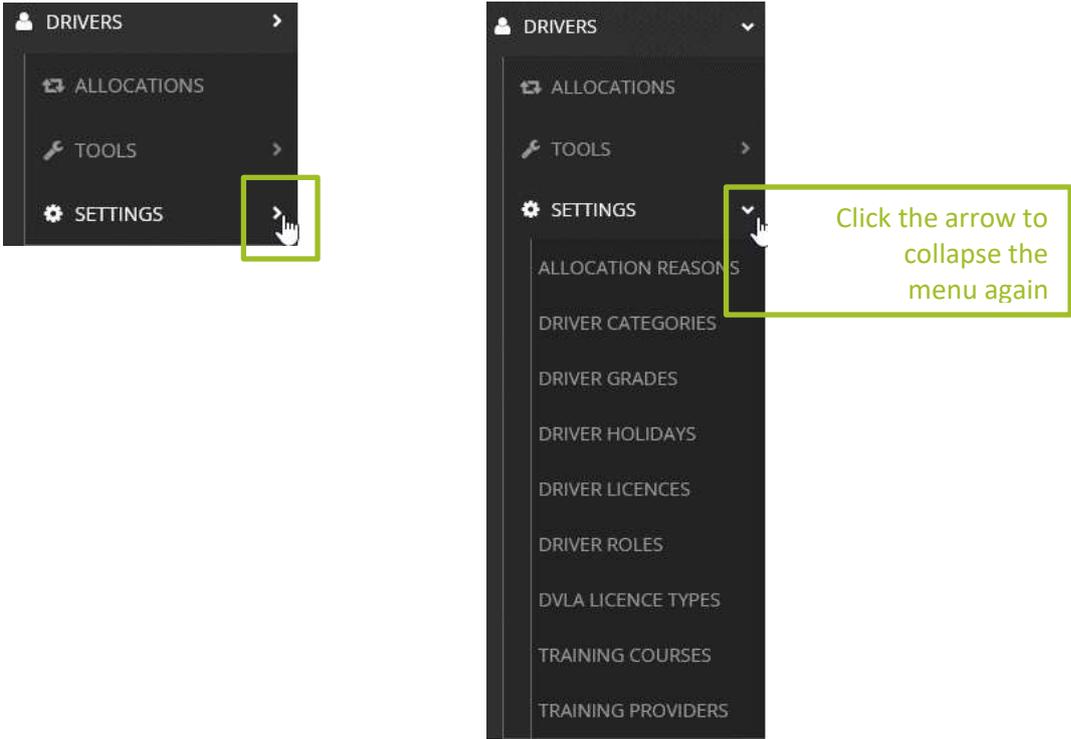




- ▶ Some sub menu items have child menu structures of their own. We can see an example of this in the “DRIVERS” modular menu, below:



- ✓ Several modules have menu sub categories of “TOOLS” and “SETTINGS”, these are tables or features that have been categorized in the FleetWave code base as a tool or a configuration type table. These menus are also expanded by clicking on the arrow to the right:



Note: sub menus will also close dynamically if you click to open another sub menu under a different parent

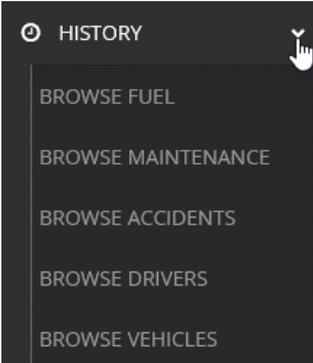
- ▶ Each level of sub menu hangs slightly below and to the right of its parent menu item.



- ▶ Menu items at all levels may be access controlled. Some menu items may not be visible to all users. Where there are no sub menu items accessible to a user, the parent menu will not display the arrow that allows users to expand and collapse that menu item.
- ▶ If a user has visual access to a menu item but does not have the appropriate permissions to access the feature behind that menu item, FleetWave will display a prompt to the user:

**You don't have permission to access this page.
This page requires access to – Utilities module**

3.2.6. History



- ▶ Within each new login session, as you browse through your FleetWave application, the system is recording a history of your browse activity. You can open the history sub menu to navigate your application based on your cached browse history. FleetWave will store your last 10 browse activities.

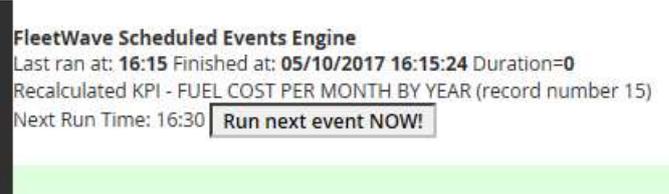
3.2.7. System Administrator Tools



- ▶ Users logging into their FleetWave application with system administration rights will also see system administrator tools at the bottom of the left menu:

✓  **Modify Menu Quick Link** – this opens the MENUS_FW table for administrators to manage user left menu structures.

✓  **Expose Event Queue** – Clicking on this feature reveals a hidden frame at the top of your current FleetWave screen. It notifies administrators of event activity and run times:





3.3. How to Navigate Home Page Charts

3.3.1. Clicking on the chart area of any home page chart will open that chart in "chart viewer" mode:

Chart as viewed from the home page dashboard:

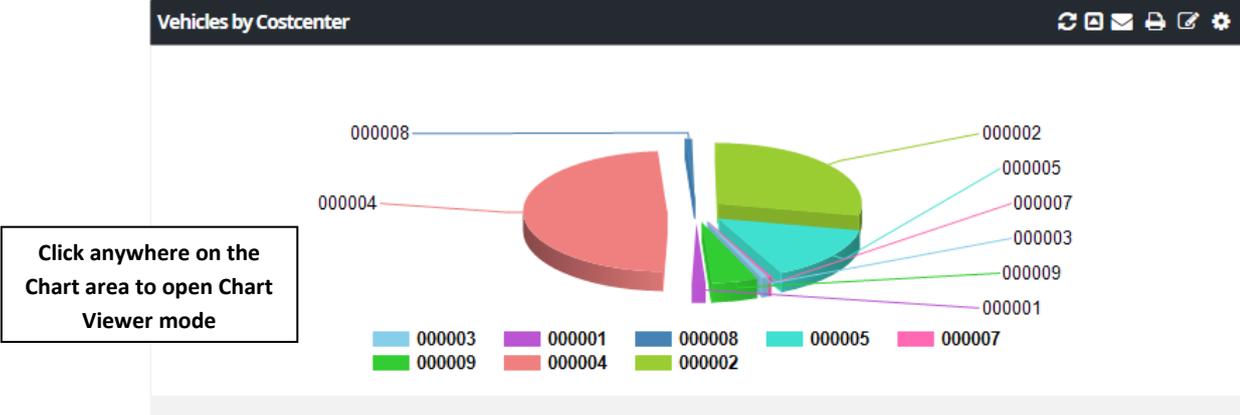
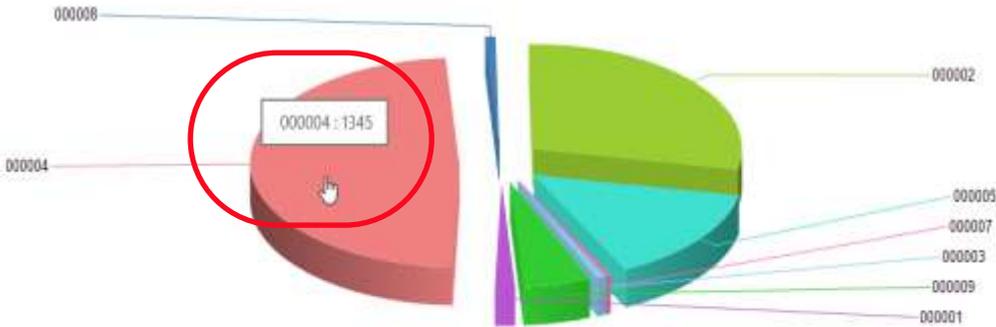


Chart as viewed within the chart viewer:

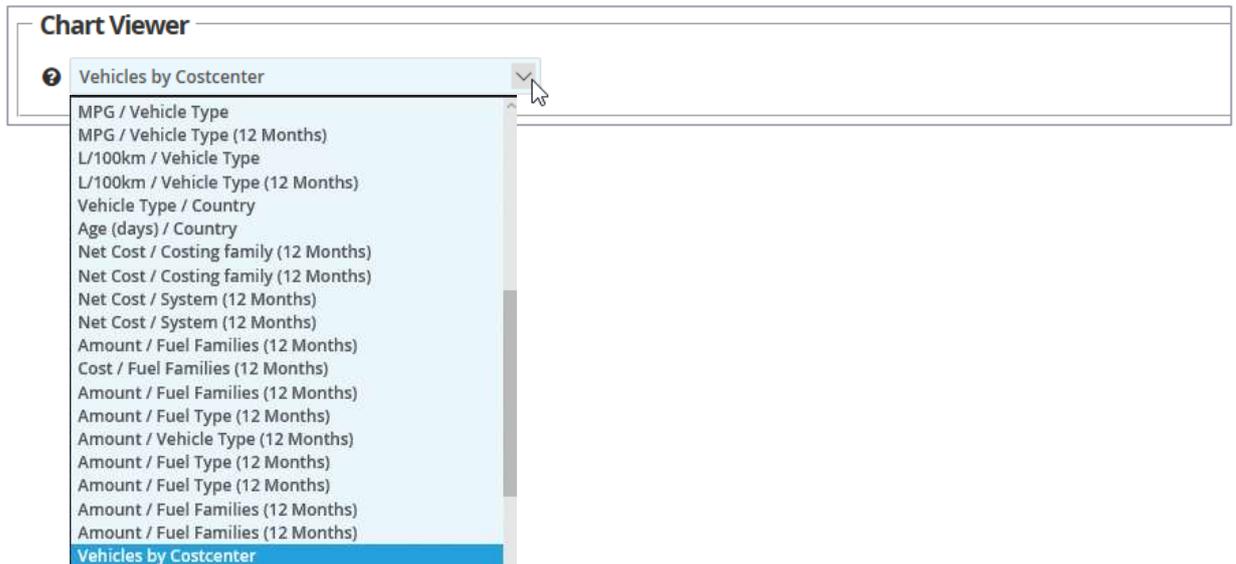


Notice that in Chart Viewer mode, a table of chart data is also presented on the top right-hand side. This is the data which drives the chart output.

3.3.2. Within the chart viewer, if we hover over any single data series point, FleetWave displays a tool tip showing the series name and value



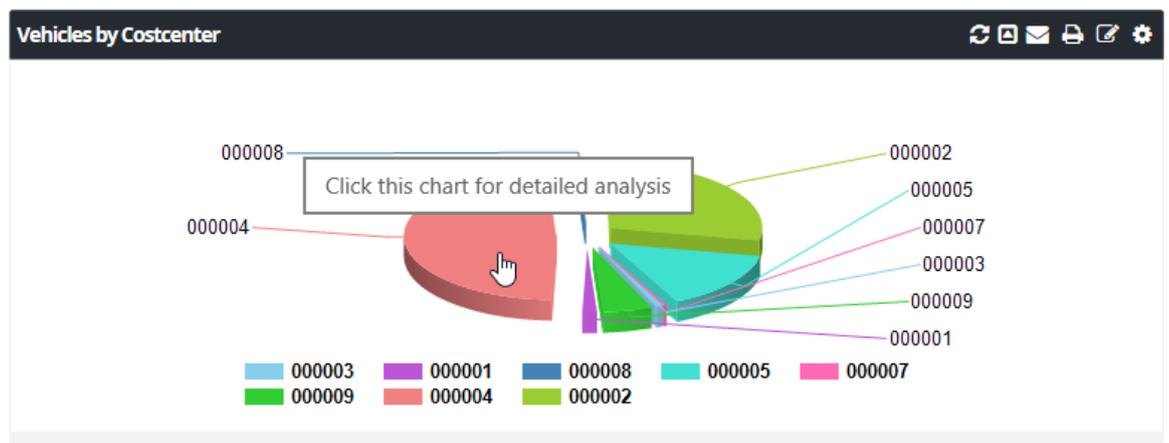
3.3.3. Also within the “Chart Viewer”, there is a drop-down box which allows you to select and switch between available reporting charts.



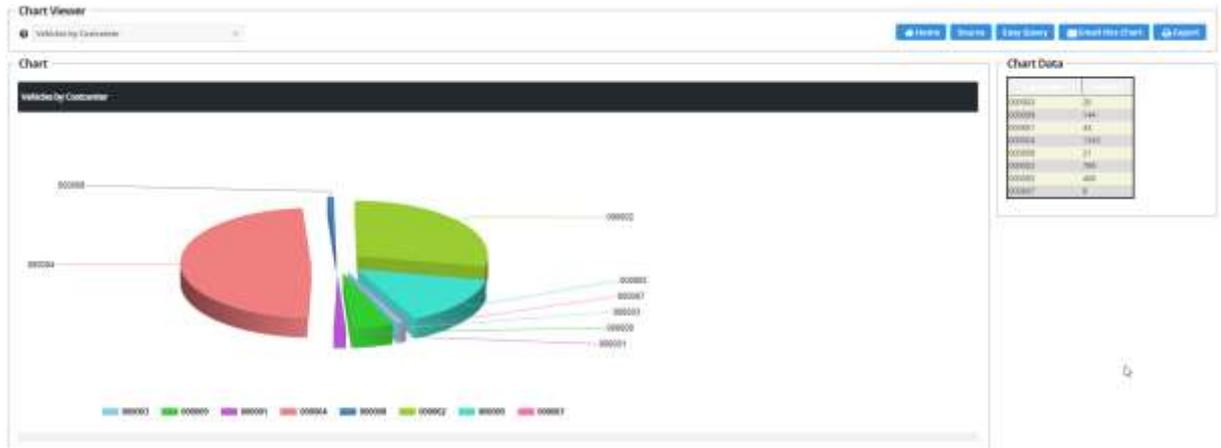
3.3.4. Depending on chart configuration and user permissions, it may be possible to nest parent and child charts such that a child chart can be drilled into directly from its parent when in chart viewer mode. Up to 9 charts (drill levels) may be nested in this way.

3.3.5. To drill into a parent chart:

- ▶ Locate a Chart on the home page Dashboard and left click on it:



- ▶ FleetWave presents the Chart in “Chart Viewer” mode:



- ▶ Whilst in Chart Viewer mode, we can simply click on the chart area again to drill into the next level of Chart. If the nested chart is configured to filter by the series of the parent chart, then clicking on a specific series category will display the next level of chart filtered by the selected parent series category.

For Example:

In the below example, our parent Chart is a pie chart for a count of all vehicles grouped by Costcentre. If we hover over the series category “000004:1345” (Costcentre 4: 1345 vehicles) (Figure 5) and click on this series category, the next level of Chart (figure 6) shows me a count of vehicles grouped by vehicle type only for Costcentre 4.

Click on series 000004:1345

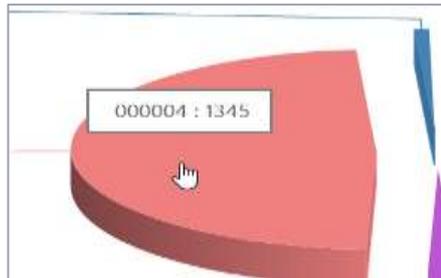


Figure 5

Count of Vehicles by Vehicle Type (Costcentre 4)

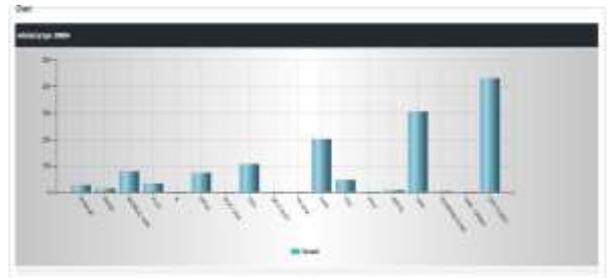


Figure 6

Whereas, if I hover over the series category “000005:406” (Costcentre 5: 406 vehicles) (Figure 7) and click on this series category, the next level of Chart (figure 8) shows me a count of vehicles grouped by vehicle type only for Costcentre 5.

Fig3. Click on series 000005:406



Figure 7

Fig4. Count of Vehicles by Vehicle Type (Costcentre 5)

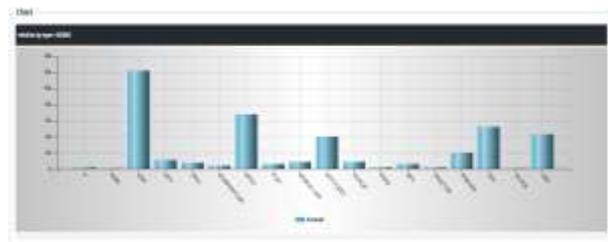
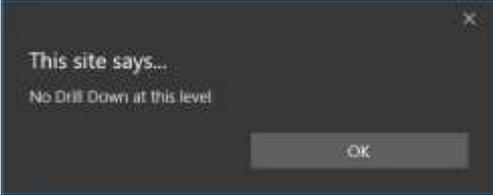


Figure 8



- ▶ All features of the chart viewer tool are available for charts at all drill levels.
- ▶ To continue to drill into lower level child Charts, repeat the process of clicking on a series category of the immediate parent Chart. Once there are no further drill levels remaining, FleetWave displays the following message:

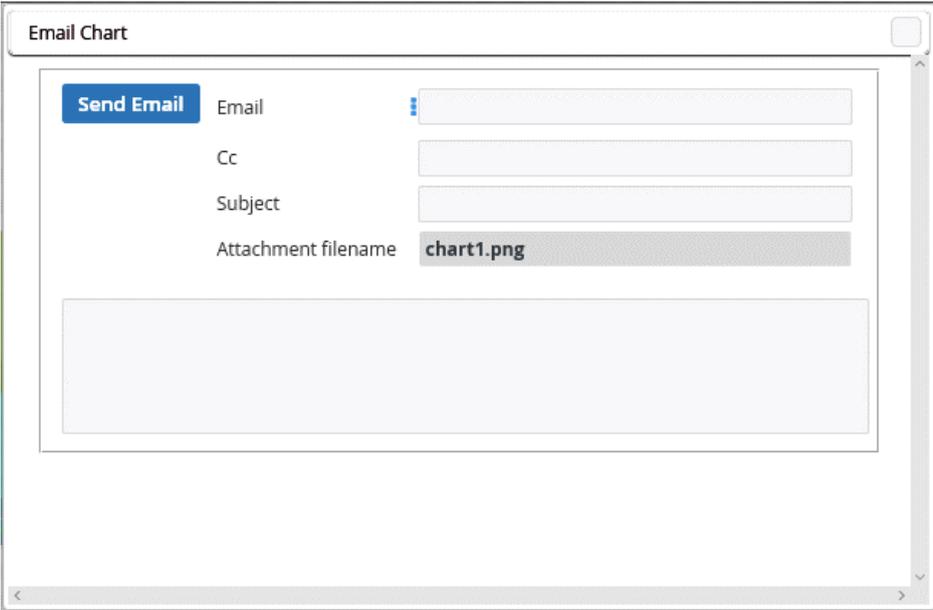


- ▶ Click on "OK" to close this pop-up.

3.3.6. There are 5 standard feature buttons to the top right of the chart viewer tool, we will look at each of these features in turn:



- ▶ **HOME:** Click here to return you to the FleetWave home page (or the original source location).
- ▶ **SOURCE:** Click "Source" to take you back to the top parent chart level within the Chart Viewer tool.
- ▶ **EASY QUERY:** Clicking "Easy Query" re-opens the visible chart level in edit mode within the chart wizard. Changes can be made to simple charts in this way. The editing of more complex charts, however, should be managed by report administrators within the main KPIs table.
- ▶ **EMAIL THIS CHART:** Click to launch a tool and send an image of the on-screen chart to any recipient.





- ▶ **EXPORT:** Click “Export”, to launch the FleetWave export tool. This can be used to export the chart data (not the Chart image) in any of the following formats:

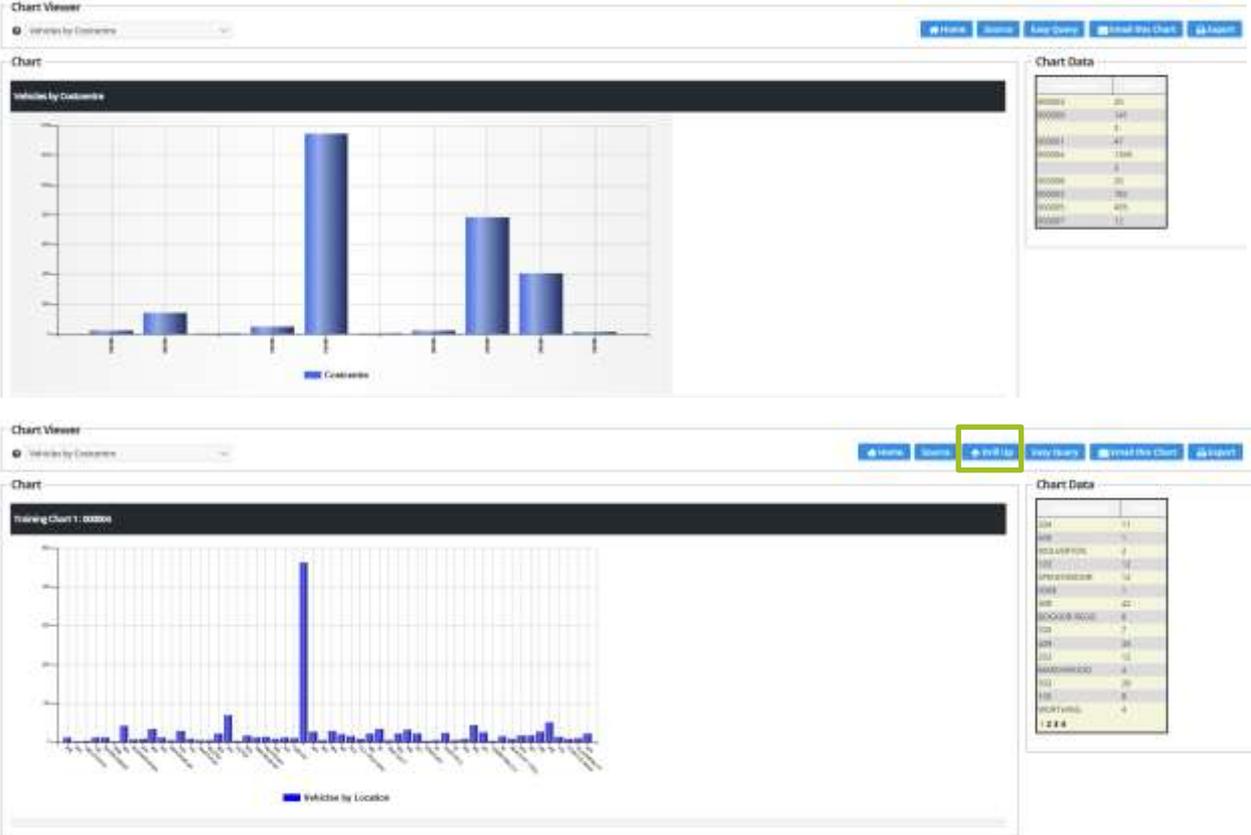


3.3.7. A sixth (6th) feature button also renders if the chart being viewed has child charts nested beneath it. Child charts can be drilled into from a parent chart within the chart viewer tool. When we drill down in this way, each child chart is potentially filtered by the parent series. Once we have drilled into a child chart, the following feature button appears:

- ▶ **DRILL UP:** Click “Drill Up” to move back to the previous parent chart.

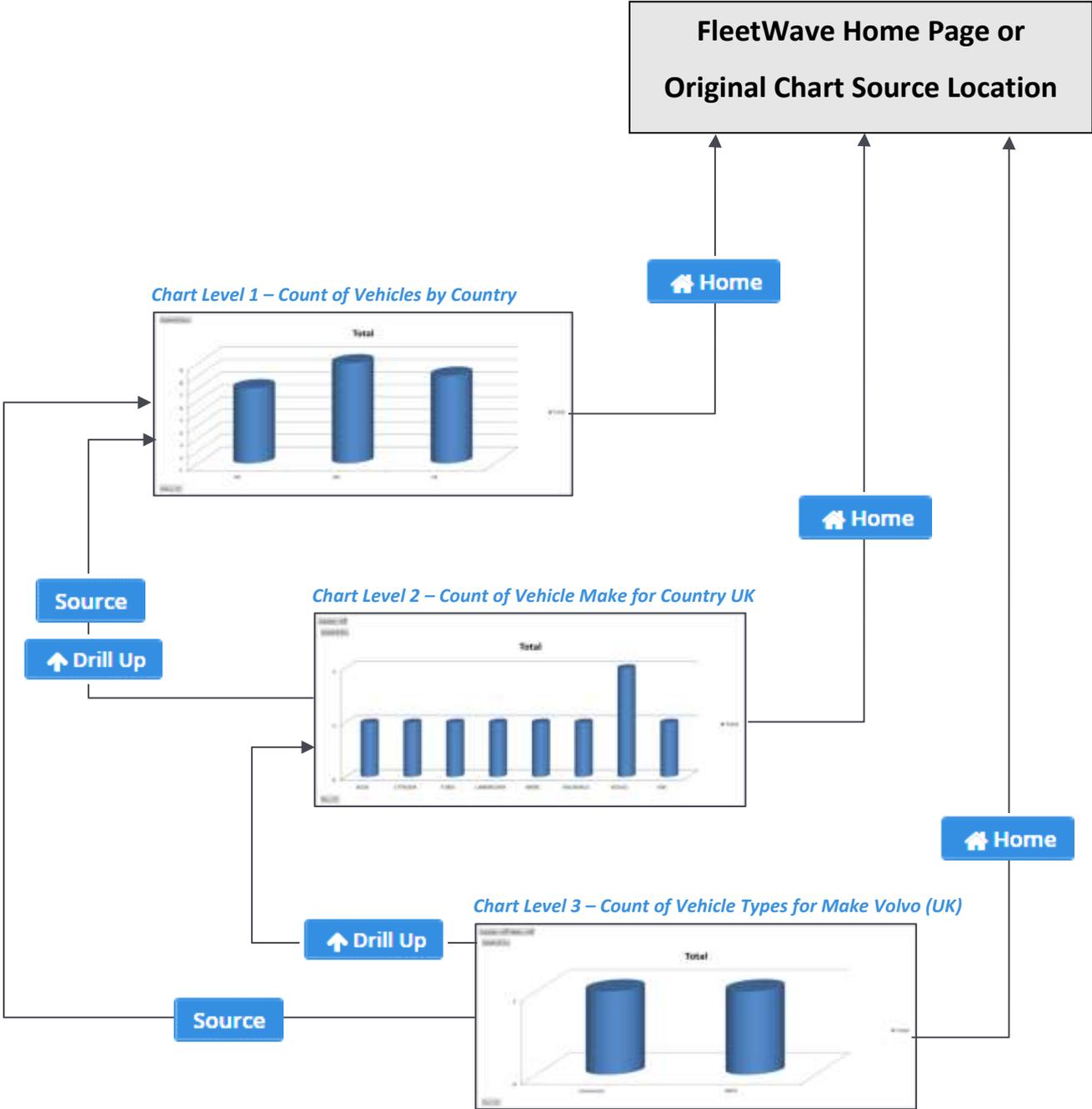


- ✓ The below example shows a parent chart and a child chart. Note how the “Drill Up” button is visible against the child chart, but not the parent chart.





3.3.8. The below model illustrates the functionality of the “Source” and “Home” features:





3.4. How to Navigate to a Filtered Data Set Using Fleet Status KPIs

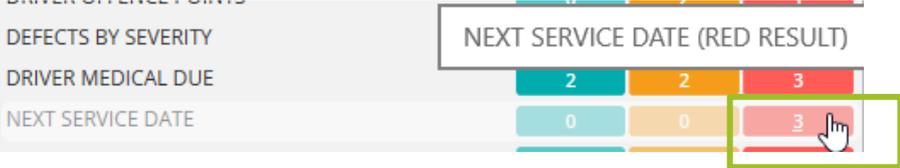
3.4.1. We can navigate to the source database of a KPI report using the status navigation links in the fleet status tool. When using the fleet status tool in this way, the source database opens in a pre-filtered state to reflect the results of the KPI colour indicator.

3.4.2. For example, if a KPI is based on the vehicle module, we can use the Fleet Status KPI to jump to the Vehicles table in an auto-filtered state based on the KPI colour status selected:

- ▶ **Green** Action will be needed in the future but no immediate need for action or concern (left hand column)
- ▶ **Yellow** Will need action or attention very soon (centre column)
- ▶ **Red** Needs urgent action or attention (right hand column)

FLEET STATUS			
COSTCENTRE		SELECT	
DRIVER EYE TEST DUE	2	2	2
DRIVER OFFENCE POINTS	0	2	1
DEFECTS BY SEVERITY	0	4	1
DRIVER MEDICAL DUE	2	2	3
NEXT SERVICE DATE	0	0	3
TAX DATE	0	0	7
DRIVER LICENCE CHECKS DUE	1	1	2
MOT DATE	0	0	8

▶ To do this, we simply click on the appropriate colour indicator for the KPI we wish to review:



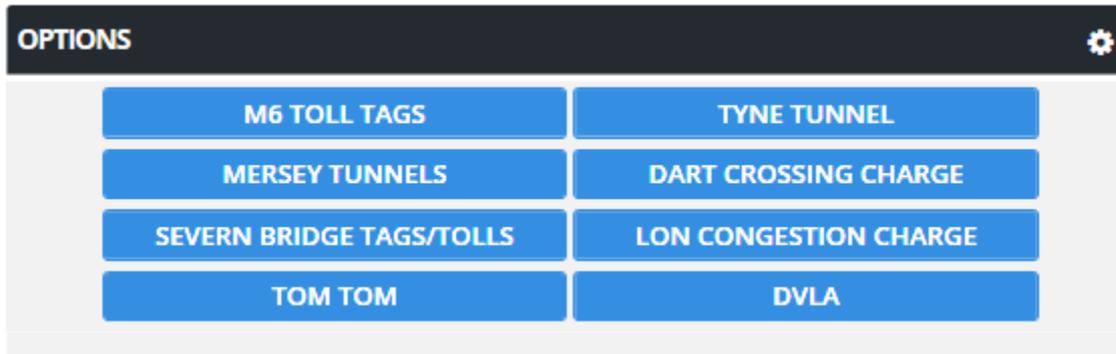
▶ In the above example, the KPI report “NEXT SERVICE DATE” indicates that we have 3 vehicles sitting with a red status (requires urgent action). When we click on the red status, FleetWave opens a filtered list of all vehicle records which fall into that KPI Red result, allowing us to take the necessary action for our data records:

REGISTRATION NUMBER	CONTAINS	SEARCH	CLEAR	PDF	PRINT QUERY	QUICK LINKS	NEXT SERVICE DATE	RED RESULT	SEARCH KPIS	CLEAR KPIS
CF31909										
CFAD1122										
CFDE1940										

✓ Note that FleetWave applies a KPI filter within the data browse screen. This filter will be remembered unless manually cleared. Click “CLEAR KPIS” to remove the filter.



3.5. How to Navigate Using the Dashboard Options Menu



3.5.1. This is a feature which provides an additional area on the FleetWave home page dashboard where links to other features, documents or external sites can be stored to facilitate user navigation.

3.5.2. In some applications, this feature may be switched off. However, it is a standard feature of the FleetWave application and may be activated by a system administrator at any time.

3.5.3. Why might you need another home page menu area?... well, this depends on the size of your application, the modules, features and tools in use, the complexity of your user strategy and your methods of working. Below are some reasons why a separate home page dashboard menu might be beneficial to usability:

- ▶ There are already many links visible to users in the left menu, large menus can be cumbersome to navigate. Moving some links to this area might improve workflow efficiency.
- ▶ Users need regular and quick access to very specific workflow applications that are interfacing with the FleetWave application but are not “of” it.
- ▶ Users need regular and quick access to external websites and non-interfacing tools.

3.5.4. Your business may set up any number of optional links in this area of the home page.

3.5.5. Clicking on a link will navigate the user to the linked feature. Links to external sites and applications should be configured to open in a new browser window. For example, if we click on “M6 Toll Tags”, the M6Toll home page opens in a new window.



Link to M6 Toll Tags opens the web page in a new window



4. Database Browse

Database Browse Learning Objectives

During this section, participants will gain an understanding of the following:

- 4.1. Data Browse Tables
- 4.2. Top Bar Browse Features
- 4.3. Standard Browse Screen Features
- 4.4. Browse Table Column Header Features
- 4.5. Data Record Features

4.1. Data Browse Tables

4.1.1. Clicking on a menu link that references a data table will navigate the user to that data table.

4.1.2. When navigating to a data table, the first screen that we see is referred to as a “Browse Screen” and the first level of table visible to the user is referred to as a “Browse Table”. Below is an example of a Fuel “Browse Screen”/ “Browse Table”:

REGISTRATION NUMBER	DATE	AMOUNT	COST	LOCATION CODE	RELATIVE	ODOMETER	COORDINATE
12345678	11/04/2016	81.00	61.000	CHEVNAK	DL	20003	
12345678	01/01/2015	56.83	67.4283		DL	137523.0	CHEVNAK
12345678	04/01/2015	41.85	58.4395		DL	137033.0	CHEVNAK
12345678	08/01/2015	51.77	57.8385		DL	136863.0	CHEVNAK
12345678	11/01/2015	52.38	64.0388		DL	136453.0	CHEVNAK
12345678	13/01/2015	42.54	57.5386		DL	136713.0	CHEVNAK
12345678	18/01/2015	55.44	58.9483		DL	136773.0	CHEVNAK
12345678	25/01/2015	65.47	73.3317		DL	136883.0	CHEVNAK
12345678	02/02/2015	51.36	58.4483		DL	137073.0	CHEVNAK
12345678	08/02/2015	58.32	66.6178		DL	137813.0	CHEVNAK

4.1.3. A browse screen presents additional navigation features in the top bar and a series of standard database browse features just above the Browse Table column headers.

4.1.4. Other existing features, such as page navigation tools and add/delete features are rendered active.

4.1.5. In the following sections, we will discuss these features along with column header features and data record features.



4.2. Top Bar Browse Features

4.2.1. When a user has a data browse table open, there are some new features presented in the FleetWave top bar as well as some existing features that are rendered active that are not usually active in other screens.

4.2.2. New Features:



- ▶ **FleetWave displays page numbers** – Page numbers increase according to the number of data records (or rows) present in the data table at the point of table launch or refresh. Pages can be navigated directly by clicking on a page number. The page number for the page in view is presented in **bold** font.
- ▶ **FleetWave Record Counter** - The presented data records (rows) are counted and the count value is displayed in brackets to the right of the page numbers. If data is later filtered, FleetWave will auto-adjust this count value to correspond to the number of rows available in your filtered data set.

4.2.3. Features that become Active:

- ▶ **Page Navigation Features** - The Page Next, Page Back, Page First and Page Last features are active within Database Browse Screens.

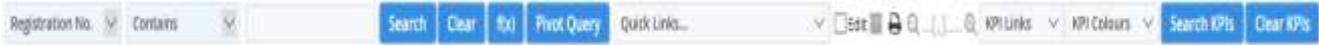


- ▶ **Add/ Edit/ View (AEV) Features** – The “Add” and “Delete” Features that allow users to create, archive or delete data records become active.





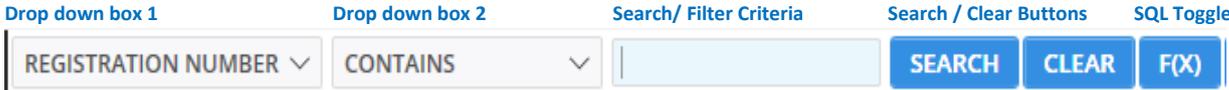
4.3. Standard Browse Screen Features



4.3.1. Browse table functional features appear directly above the Browse Table and may be broken down into the following feature sets.

- ▶ Search and Filter
- ▶ Pivot Query
- ▶ Quick Links
- ▶ Bulk Edit
- ▶ Archive Toggle
- ▶ Print / Export
- ▶ Font Size Regulator
- ▶ KPI Filters

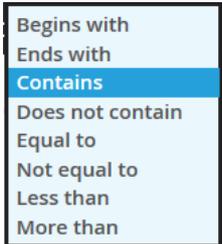
4.3.2. Search and Filter:



- ▶ The first (1st) feature set permits data filtering, this set is grouped as above and described below:
 - ✓ **Drop down box 1:** This holds a list of all column names visible in your data browse table. Select the column name by which you’d like to search or filter your data. Unless otherwise configured, the default column name will be the first column name in your table; in this example of a vehicles table, this column name is Registration No. (VEHICLE_ID_FW).



- ✓ **Drop down box 2:** This provides a list of “operators” (or expressions), select the operator that best matches your search criteria. The default operator is usually “Contains” but your application may be configured differently.





- ✓ **Search/ Filter Criteria:** This is a text box where you can freely enter the expression or text string for which you would like to search.

Search/ Filter Criteria

- ✓ **Search / Clear Buttons:** Click “Search” to apply your search / filter criteria; click “Clear” to remove search criteria from the text box again.

Search / Clear Buttons

Note: Clicking clear will return all pre-selected criteria to either a blank or default value. The “Clear” button also interfaces with column header filters; this interface is described alongside the article on column header filters.

- ✓ **SQL Toggle:** Click “F(x)” to toggle between the normal search/filter feature set and a free format SQL entry search box. SELECT QUERY LANGUAGE can be typed freely into the SQL search bar to generate a search result of your choosing. Enter your SQL query and click “Search”. Click “F(x)” again to toggle back to the standard feature.

Please note that this feature is only available to system administrators.

SQL Toggle

▶ **Example Filter Using the Standard Search/Filter Feature Set:**

- ✓ In the below Vehicles table, if we only want to return data records for vehicle registration numbers containing “GH”, we would enter the following search criteria and click “Search”:

- ✓ We now just see Vehicle records containing the string “GH”. This text string may appear in any position within the Registration number, in this instance.

<input type="checkbox"/> REGISTRATION NUMBER <input type="text" value="j"/> <input type="text" value="T"/>	<input type="text" value="T"/>	<input type="text" value="T"/>	<input type="text" value="T"/>	<input type="text" value="T"/>
<input type="checkbox"/> <input type="checkbox"/> FP14GHD	AUDI	A3	C	LIVE
<input type="checkbox"/> <input type="checkbox"/> SP14GHT	VOLKSWAGEN	GOLF	C	LIVE
<input type="checkbox"/> <input type="checkbox"/> TS157GH	AUDI	A3	C	LIVE



4.3.3. Pivot Query

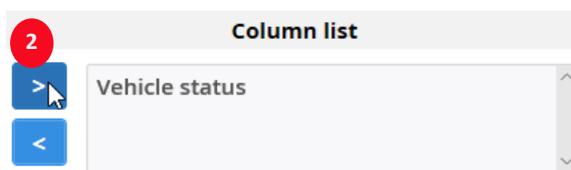
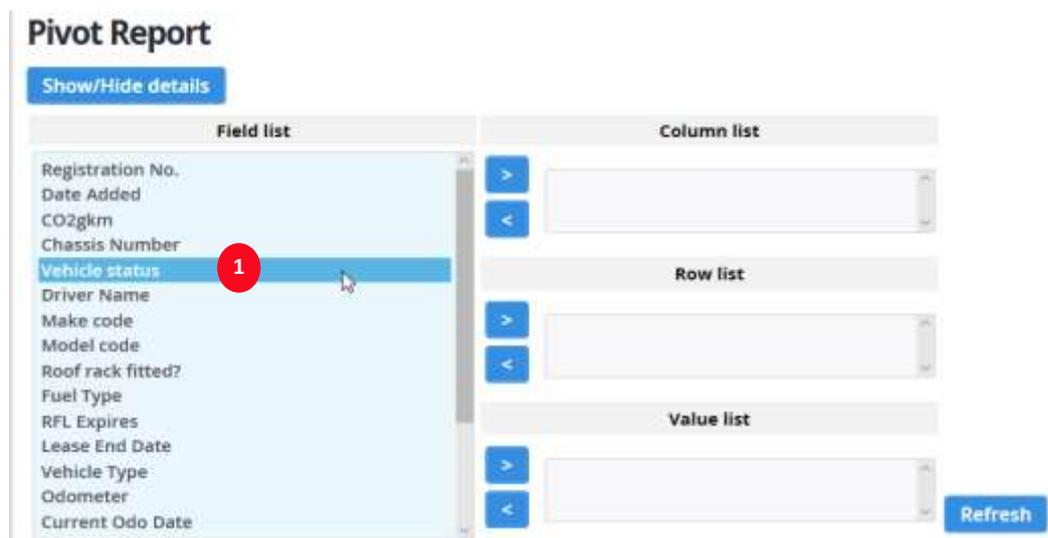
- ▶ The Pivot Query feature offers a quick and effective way to analyse and pivot the complex data held within your data records and produce simple, easy to read, report summaries. FleetWave pivot queries may be printed or exported into MS Excel as required.
- ▶ Click on “Pivot Query” to display the following pivot query wizard; a “Field list” appears to the left of the screen and empty pivot criteria boxes appear to the right.
- ▶ The “Field list” is a list of all the column (or field) names available in the data browse table from which the pivot query feature is launched. In the below example, pivot query has been launched from a “Vehicles” browse screen, therefore the “Field list” provides a comprehensive list of the vehicle browse table column attributes.

- ▶ Within the pivot wizard, enter one data column to the “Column list”, one data column to the “Row list” and one data column to the “Value list”. If multiple fields are entered into any one list section, the pivot table will be generated based on the first column name added to that list box only.
 - ✓ The column name placed in the “Column list” will produce the pivot table column header(s).
 - ✓ The column name placed in the “Row list” will produce the pivot table row labels.
 - ✓ The column name placed in the “Value list” will be used to aggregate data; FleetWave will count data (if a text type field) or sum data (if a numeric type field).

- ▶ To add a column name to a list box...
 - ✓ Click to select the “column name” from the “Field list” box on the left
 - ✓ Click on the “Add” feature next to the appropriate list box.



- ▶ For example:
 - ✓ To add “Vehicle Status” to the “Column list”, select “Vehicle Status” from the “Field list” (1) and click on the “Add” feature to the left of the “Column list” (2):

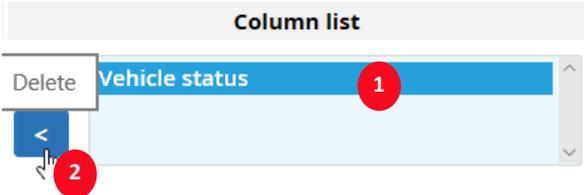


- ▶ To remove a column name from a list box:
 - ✓ Click to select the column within the list box from which you wish to remove it.
 - ✓ Click the “Delete” field icon next to that list box.





- ▶ For example:
 - ✓ To delete “Vehicle Status” from the “Column list”, select “Vehicle Status” within the “Column list” box (1) and click on the “Delete” feature to the left of the “Column list” (2):



- ▶ Let’s create a Pivot Query:
 - ✓ Let’s select “Vehicle Status” as the “Column list”, “Workshop” as the “Row list”, “Registration No.” as the “Value list”:



- ✓ To generate the Pivot Query based on the selected column names in the various list boxes, simply click “Refresh”:



- ✓ FleetWave renders a Pivot Query report that may look very similar to the below output:

Workshop	Vehicle status										Row Totals	
	DAMAGED	FORSALE	IN GARAGE	IN SWD	LIVE	ON ORDER	OUT OF SERVICE	RELEASE	SOLD	STOLEN		Unknown
-	-	-	1	-	4	-	-	-	1	-	4	10
WKS001	1	-	-	1	218	-	-	-	-	-	1	221
WKS002	-	1	-	-	412	-	8	-	2	3	1	427
WKS003	-	-	-	-	551	-	3	-	2	-	-	556
WKS004	-	-	-	-	127	-	407	-	15	-	-	549
WKS005	-	5	1	-	531	2	377	1	78	-	21	1016
Column Totals	1	6	2	1	1843	2	795	1	98	3	27	2779



✓ Whilst in Pivot Report mode, you can make changes to your pivot report at any time by clicking “Show/Hide Details” (1), this will reveal the pivot configuration in edit mode, simply make the required changes (2) and click “Refresh” to apply your updates (3):

PIVOT DATA SOURCE **PIVOT REPORT**

Pivot Report

Show/Hide details **1**

Cancel Print Excel

Vehicle status												
Workshop	DAMAGED	FORSALE	IN GARAGE	IN SWO	LIVE	ON ORDER	OUT OF SERVICE	RELEASE	SOLD	STOLEN	Unknown	Row Totals
-	-	-	1	-	4	-	-	-	1	-	4	10
WKS001	1	-	-	1	218	-	-	-	-	-	1	221
WKS002	-	1	-	-	412	-	8	-	2	3	1	427
WKS003	-	-	-	-	551	-	3	-	2	-	-	556
WKS004	-	-	-	-	127	-	407	-	15	-	-	549
WKS005	-	5	1	-	531	2	377	1	78	-	21	1016
Column Totals	1	6	2	1	1843	2	795	1	98	3	27	2779

Pivot Report

Show/Hide details

Field list

- Driver Name
- Make code
- Model code
- Roof rack fitted?
- Fuel Type
- RFL Expires
- Lease End Date
- Current Odo Date
- Date of birth
- Country
- Costcentre
- Odometer
- KEY_FIELD_FWC
- Location Code
- Vehicle status

Column list

- Vehicle Type **2**

Row list

- Workshop

Value list

- Registration No.

Refresh **3**

Cancel Print Excel

Vehicle status												
Workshop	DAMAGED	FORSALE	IN GARAGE	IN SWO	LIVE	ON ORDER	OUT OF SERVICE	RELEASE	SOLD	STOLEN	Unknown	Row Totals
-	-	-	1	-	4	-	-	-	1	-	4	10
WKS001	1	-	-	1	218	-	-	-	-	-	1	221
WKS002	-	1	-	-	412	-	8	-	2	3	1	427
WKS003	-	-	-	-	551	-	3	-	2	-	-	556
WKS004	-	-	-	-	127	-	407	-	15	-	-	549
WKS005	-	5	1	-	531	2	377	1	78	-	21	1016
Column Totals	1	6	2	1	1843	2	795	1	98	3	27	2779



- ✓ The new data is now presented in the Pivot Report (Where the Column headers have switched from Vehicle Status to Vehicle Type in the below example:

Pivot Report

Show/Hide details

Cancel Print Excel

Workshop	Vehicle Type										Row Totals
	7.5 TONNE RIGID	A&E Ambulance	Car	COMPANY CAR	Employee Owned Car	MINIBUS (17 SEAT)	TRACTOR	TRAILER	Unknown	VAN	
-	-	-	1	2	-	-	-	-	7	-	10
WKS001	2	3	-	4	-	1	1	139	68	3	221
WKS002	-	-	2	-	1	-	3	-	335	86	427
WKS003	-	-	-	-	-	-	-	-	483	73	556
WKS004	-	-	-	-	-	-	-	-	515	34	549
WKS005	-	-	5	3	-	-	-	-	618	390	1016
Column Totals	2	3	8	9	1	1	4	139	2026	586	2779

- ✓ Use the additional feature buttons to:

- Cancel the Pivot Query and return to the data browse screen



- Print your Pivot Query



- Export your Pivot Query to MS Excel



- ✓ Whilst in Pivot Reporting mode, you can toggle between your Pivot Report and a view of the source data any time by selecting between the Feature Tabs:

- PIVOT DATA SOURCE**

PIVOT DATA SOURCE PIVOT REPORT

Pivot Data Source

Registration No.	Date Added	CO₌₂/sub>gkm	Chassis Number
GF 358258	10/02/2012	J	195
GF 95203	18/10/2011	L	250 ICTCO2538

- PIVOT REPORT**

PIVOT DATA SOURCE PIVOT REPORT

Pivot Report

Show/Hide details

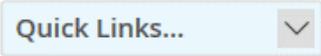
Cancel Print Excel

Workshop	Vehicle Type										Row Totals
	7.5 TONNE RIGID	A&E Ambulance	Car	COMPANY CAR	Employee Owned Car	MINIBUS (17 SEAT)	TRACTOR	TRAILER	Unknown	VAN	
WKS001	2	3	-	4	-	1	1	139	68	3	221



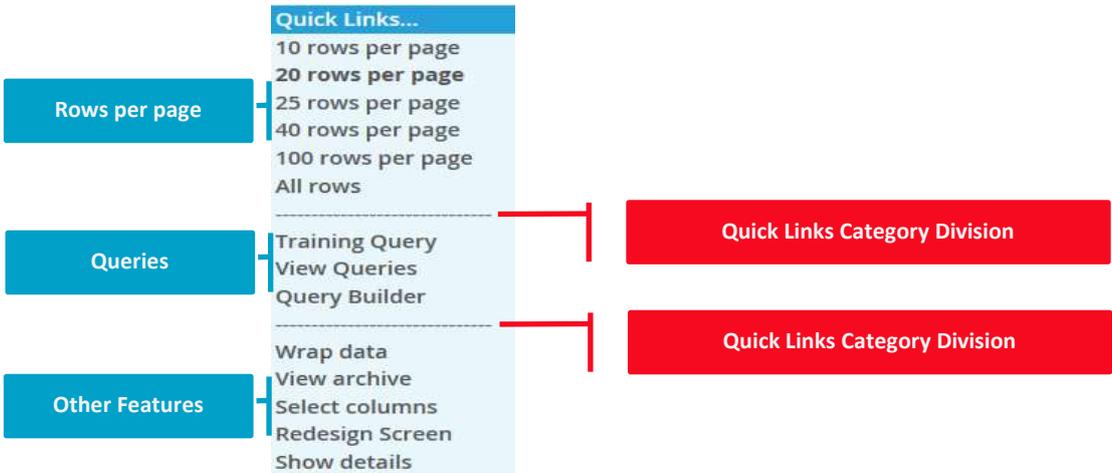
4.3.4. Quick Links

- ▶ Quick Links is a drop-down list of browse user features.



- ▶ The visible content of the quick links drop-down box may differ from one data “browse table” to the next; it may also differ from one user to another. These differences are as a result of user permissions and/or system component ownership.

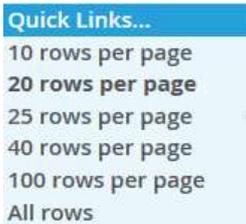
✓ Below is an example of a “Quick Links” feature set:



- ▶ “Quick Links” features fall into one of 3 clear categories; these categories are separated by horizontal dotted lines.

✓ **Rows Per Page:**

- Everything above the first dotted line is available to all users (standard Quick Links features). These features allow the user to determine how many data rows are visible per page when in browse mode. By changing the number of rows visible per page, a user may customize their own browse table view. Depending on font display size, if we select anything more than 20-25 rows per page, it is unlikely that all of these data rows will be visible on the screen at once and the user will need to scroll down to see all data records on a single page. 1000 rows per page is the default maximum number of data rows that it is possible to display on any one page.



Note: When there are more than 1000 data records within a database browse table, “1000 rows per page” is the maximum display value. When there are fewer than 1000 data records within the database browse table, the maximum display value is “All rows”.



▶ **Queries:**

- ✓ Everything in the middle section relates to FleetWave Queries. Queries are part of the FleetWave reporting suite. Queries may be either global or user/user group specific. Users may use the Query Builder wizard to create their own Queries; the names of all active Queries for the browse table in view are also available to run from the Quick Links location. To run a query, simply select it from the drop-down list. Query features are visible to users who have access to the reports module, users must also have the appropriate permissions to view individual queries.

Training Query
View Queries
Query Builder

- ✓ The following documents on the Query Builder Wizard are available on request, please state your application release version when requesting training materials so that we may provide you with the document version most appropriate to your system.
 - TRN-1049-en FleetWave - The Query Builder Wizard (user manual)
 - TRN-1057-en FleetWave - The Query Builder Wizard (quick reference guide)
 - Training videos are also available on the Chevin Academy Community Portal in support of Query Builder.

▶ **Other Features:**

- ✓ The lower section houses a series of “Other Features”; some of which are user access controlled.

Wrap data
View archive
Select columns
Redesign Screen
Show details

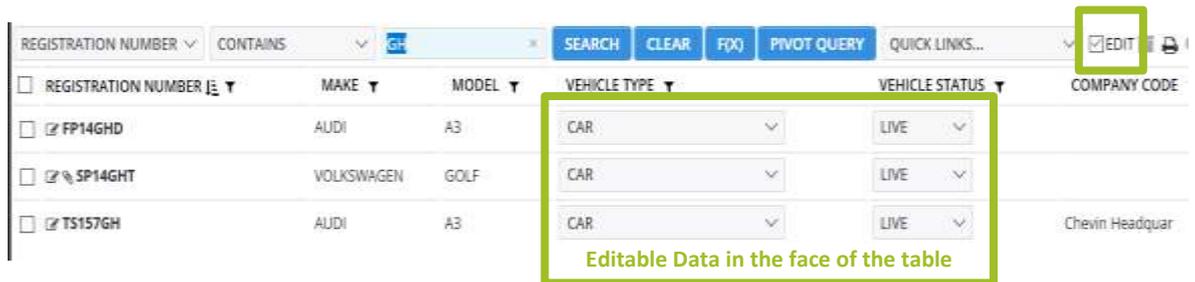
- ✓ Global features that are visible to all:
 - **Wrap data** – click to wrap data in columns with large content. Wrapped data will increase the row height of data records within the browse table to shrink column width.
 - **View archive** – click to toggle to a view of archived data records. When in archive mode, this link is listed as “Hide archive”.
- ✓ Features that are visible to system administrators and database managers only:
 - Select Columns
 - Redesign Screen
 - Show Details

These features are covered in system and user administration training guides.

4.3.5. Bulk Edit

Edit

- ▶ Bulk Edit is a system over-ride feature and is reserved for system administrators and database managers. This feature will not be available to users without the appropriate level of access.
- ▶ The name of this feature in full is “Bulk Edit Set Active”
- ▶ The feature presents itself as a logical check box, when checked, columns within the browse table become editable directly within the face of the table itself; providing a fast and effective way to update record data. However, updating records in this way also comes with some risk.



REGISTRATION NUMBER	MAKE	MODEL	VEHICLE TYPE	VEHICLE STATUS	COMPANY CODE
FP14GHD	AUDI	A3	CAR	LIVE	
SP14GHT	VOLKSWAGEN	GOLF	CAR	LIVE	
TS157GH	AUDI	A3	CAR	LIVE	Chevin Headquar

- ▶ The risks of updating data records using the Bulk Edit tool:
 - ! One or many records can be updated with a single click or textual entry – placing a check in the box to the far left of multiple data rows will forcibly update all data rows in the same way when one record is edited.
 - ! There is **no** “undo” feature
 - ! To save data edited during Bulk Edit, you simply uncheck the “Edit” checkbox at the top of the screen again. Data is saved but in such a way that the standard “Save” button is skipped, which is the means of saving when entering or editing data directly inside a record. Occasionally, there are other features, functions or calculations plugged into certain data fields (columns) within some tables. If you bulk edit a field that is intended to trigger plug-in functionality, this functionality will not be triggered when committing updates via the Bulk Edit tool. Plug-in features will not be triggered again until the next time a record is changed and saved in the conventional way. Data rules will continue to run, however.

4.3.6. Archive Toggle

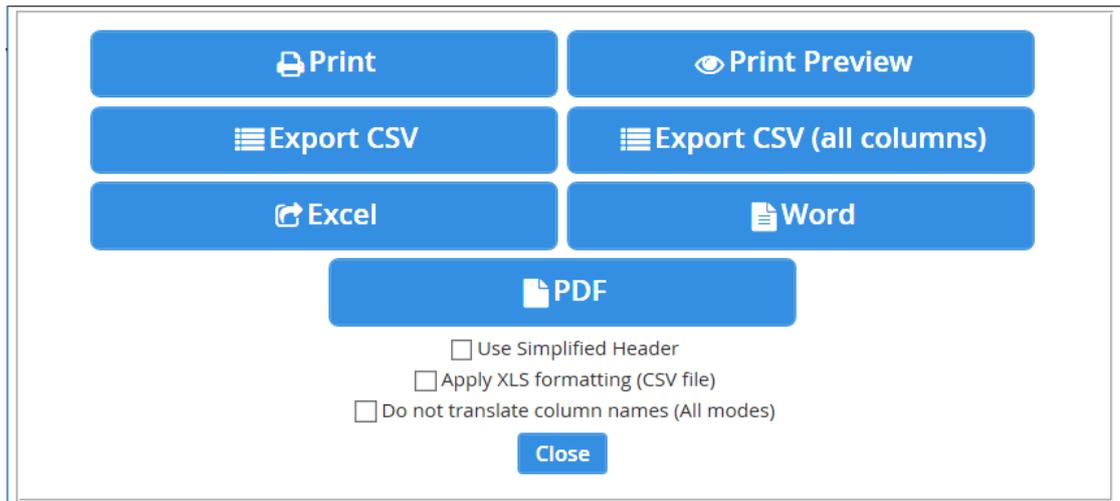


- ▶ The Archive toggle button facilitates movement between live and archived data records.
 - ✓ When viewing live data, the toggle icon appears grey.
 - ✓ Click the icon to toggle to archived data records
 - ✓ When viewing data in archive mode, the toggle icon appears red.
 - ✓ Click the archive toggle button again to move back from “archived” records to “live” records.
 - ✓ When is archive mode, FleetWave displays the archive status in the top bar (1).

4.3.7. Print / Export



- ▶ The Print/ Export feature allows users to print and/or export data from the data records held within the open browse table. Data can be exported in different formats.
- ▶ Clicking on the Print/ Export feature triggers the following pop-up:



- ▶ This pop-up is a feature set. The feature set houses several user options to print and/or export data. A brief definition of each option is offered below:
 - ✓ **Print** – click print to launch your printer options and to print data for all records visible within the open browse table, filters are applied to print results. FleetWave will print only the data held within the browse table columns.
 - ✓ **Print Preview** – review the printable data prior to launching the print function. To print from the “Print Preview” screen, scroll to the bottom and click “Print”
 - ✓ **Export CSV** – select this option to export a CSV type file. By default, the raw CSV data will export into MS Excel. Choosing this option will export only the data held within the browse table columns. Once exported, the column order in the export file will match the column order on your FleetWave screen. Raw CSV data holds no formatting.

Files exported to MS Excel in a CSV format may look something like this:

	A	B	C	D	E	F
1	Registration No.	Date Added	CO₂gkm	Chassis Number	Vehicle status	Driver Name
2	AE52KHA	22/02/2008		0 VF1FDCNL527541456	Live on Fleet	FINBARR STEWART
3	AE52KHH	22/02/2008		0 VF1UDCNK527300412	Live on Fleet	
4	AE52KHV	22/02/2008		0 VF1UDCNK527300597	Live on Fleet	FINBARR STEWART
5	AE52KJJ	22/02/2008		0 STEVE123	Live on Fleet	SARAH DONOVAN
6	AE52KJK	22/02/2008		0 VF1FDCGH524908205	Live on Fleet	STEVE LLEWELLYN

- ✓ **Export CSV (all columns)** – select this option to export a CSV type file that contains all data for all data records; this includes data fields held both within the browse table columns as well as data fields that sit behind each record. The column order of the CSV (all columns) data, should match the sequencing of properties (or fields) within the data records. Fields will be cycled in default tab order.
- ✓ **Excel** – click to export data held within the browse table columns into MS Excel in an XLS format.

An export into MS Excel may look like this:

	A	B	C	D	E	F
1	RFL Expires (Red result)					
2						
3	Registration No.	Date Added	CO₂gkm	Chassis Number	Vehicle status	Driver Name
4	AE52KHA	22/02/2008	0	41456	Live on Fleet	FINBARR STEWART
5	AE52KHH	22/02/2008	0	00412	Live on Fleet	
6	AE52KHV	22/02/2008	0	00597	Live on Fleet	FINBARR STEWART
7	AE52KJJ	22/02/2008	0	STEVE123	Live on Fleet	SARAH DONOVAN
8	AE52KJK	22/02/2008	0	08205	Live on Fleet	STEVE LLEWELLYN

All exports using the Excel format are formatted with bold column headers and borders; they also include an export header by default. The header is made up of two data rows at the top of the export data.

Top left is the name of the export data set.

	A	B	C	D
1	RFL Expires (Red result)			
2				
3	Registration No.	Date Added	CO₂gkm	Chassis Number
4	AE52KHA	22/02/2008	0	41456

Top right is a date and time stamp and the name of the exporting USER ID.

	Q	R	S	T
	Date 02/08/2017 14:22, User ID CHEVIN:LISAS			

Country	Costcentre	Workshop	Location Code
GR	000001	WKS002	EXETER
MC	000009	WKS002	EXETER
RU	000004	WKS002	TRAFFORD
RU	000002	WKS002	EXETER
HU	000005	WKS002	EXETER



- ✓ **Word** – Click to export data held within the browse table columns to an MS Word file. This option may not be suitable for very large data sets.

An export into MS Word may appear as below:

Export

Registration No.	CO ₂ gkm	Chassis Number	Vehicle status	Driver Name	Make code	Model code
AD52ADV	0.00	WFOLXXGBFL2R75767	Live on Fleet	test user	Mazda	RX-8
AD54MFS	0.00		Live on Fleet	ADAM M DUNCAN	Skoda	Octavia
AE52KHA	0.00	VF1FDCNL527541456	Live on Fleet	FINBARR STEWART	D6	Laguna
AE52KHH	0.00	VF1UDCNK527300412	Live on Fleet		D6	MASTE
AE52KHV	0.00	VF1UDCNK527300597	Live on Fleet	FINBARR STEWART	G4	3200
AE52KJJ	0.00	STEVE123	Live on Fleet	SARAH DONOVAN	D6	MASTE
AE52KJK	0.00	VF1FDCGH524908205	Live on Fleet	STEVE LLEWELLYN	D6	MASTE

- ✓ **PDF** – Click to export data held within the browse table columns to a PDF file format. This option may not be suitable for very large data sets.

An export into a PDF file format may appear as below:

Export Date: 02/08/2017 14:44, User ID: CHEVIN.USAS

Registration No.	CO ₂ gkm	Chassis Number	Vehicle status	Driver Name	Make code	Model code	Fuel Type	RFL Expires	Lease End Date	Vehicle Type	Odo meter	Current Date	Date of birth	Cost	Works hop	Location Code
258258	195.00		Live on Fleet	DCFDFFD SFDS	LEXUS	IS DIESEL SALOON	DL			COMP ANY CAR	760.0	28/06/2017	01/01/1987	000.009		WKS001
35203	250.00	ICTCO2538	Return to Lease	ADRIAN KERR-DELWORTH	DB	9-3	820	08/06/2016			0.0			000.005		WKS005 BRANDON
462RSJ	0.00		For Sale		TOYOTA	Hilux	820	08/06/2016			1163.0	16/08/2016		000.009		WKS005 BELPER
54321	221.00		For Sale	DAVID SMITH	BMW	3 SERIES COUPE	820	08/06/2016			0.0		25/09/1972	000.008		WKS005 EXETER
AA191ABC	0.00		In Garage		A5	Continental A3	820	08/06/2016		VAN	12500.0	18/08/2016		000.001		WKS005 EXETER
AAAAAA	174.00		DAMAGE		AUDI	A3 CABRIOL ET A3	UL				0.0			000.009		WKS001

- ✓ **Use Simplified Header** – this applies to all export types where the word “Export” is visible as a Primary Header at the top of the export page. By checking this box, the header “Export” is removed from the exported data output.

Use Simplified Header

Below is an example of an Excel export with the option “Use simplified Header” checked:

	A	B	C	D	E
1	Registration No.	CO₂gkm	Chassis Number	Vehicle status	Driver Name
2	AB11ERD	173		For Sale	DAVID SMITH
3	ABC123	0		Live on Fleet	FLETCHER
4	AD52ADV	0	5767	Live on Fleet	test user
5	AD54MFS	0		Live on Fleet	DUNCAN
6	AE52KHA	0	456	Live on Fleet	STEWART



- ✓ **Apply XLS formatting (CSV file)** – This option applies to either “Export CSV” or “Export CSV (all columns)”. When checked, a CSV file is exported with all text data type columns embedded as “text”; this text formatting can be seen in the Excel formula bar if you click on the cell of an output text field; the purpose of this feature is to ensure that numeric data entered into text type fields is exported to include the entire numeric value when prefixed by one or many zeros:

Apply XLS formatting (CSV file)

- ✓ **Do not translate column names (All modes)** – All database column and field labels are created in FleetWave using a code value and are supported by system translations. The FleetWave translations table is managed by system administrators to reflect the preferred screen values in relation to FleetWave code. Selecting this option prior to export, for any format, will ensure that data is exported with the code values rather than their translated values in the column headers.

Do not translate column names (All modes)

Example data export with translated columns:

Column Name Translations

	A	B	C	D	E	F	G	H
1	Registration No.	CO ₂ g/km	Chassis Number	Vehicle status	Driver Name	Make code	Model code	Fuel Type
2	258258	195		Live on Fleet	S	LEXUS	SALOON	DL
3	35203	250	ICTCO2538	Return to Lease	DELWORTH	D9	9-3	B20
4	462RSJ	0		For Sale		TOYOTA	Hilux	B20

The same data exported without translated columns:

	A	B	C	D	E	F	G	H
1	VEHICLE_ID_FW	CO2GKM_FW	CHASSIS_NUMBER_FW	VEHICLE_STATUS_FW	DRIVER_NAME_FW	MAKE_CODE_FW	MODEL_CODE_FW	FUEL_TYPE_FW
2	258258	195		Live on Fleet	DCFDDFFDSFDS	LEXUS	IS DIESEL SALOON	DL
3	35203	250	ICTCO2538	Return to Lease	DELWORTH	D9	9-3	B20
4	462RSJ	0		For Sale		TOYOTA	Hilux	B20

Note: Data filters are applied to all export formats.

4.3.8. Font Size Regulator

- ▶ This feature permits users to increase or decrease the zoom of the font within their browse table records for personalized, optimized browse table viewing.



- ✓ Click on the “+” to increase the font zoom
- ✓ Click on the “-” to decrease the font zoom
- ▶ Users can also manage their FleetWave displays by increasing or decreasing their browser zoom.



4.3.9. KPI Filters

- ▶ KPI filters interact with home page fleet status KPIs of item type “KPI”. The KPI filter features are only rendered (visible) on a data browse screen when:
 - ✓ An active fleet status KPI is available for that table.
 - ✓ A user has appropriate permissions to view at least one active KPI for the open table.



- ▶ Let’s define the KPI Filter features:
 - ✓ Drop-down box 1 holds a list of KPI reports that are available for the open data browse table:
 - KPI Links
 - RFL Expires
 - Vehicles

Note: KPI Links is the name of this filter feature
 - ✓ Drop-down box 2 holds a list of KPI colours; these correspond to the KPI traffic light system.



Note: KPI Colours is the name of this filter feature

- **Green Result** – displays results that fall into the green category boundaries
 - **Yellow Result** – displays results that fall into the yellow category boundaries
 - **Red Result** – displays results that fall into the red category boundaries
 - **All Result** – displays results that fall into the green, yellow and red category boundaries (this may not be all data records, however)
 - ✓ Feature Buttons:
 - Click “Search KPIs” to filter by your selected KPI filter criteria
 - Click “Clear KPIs” to remove KPI filters.
- ▶ To Filter for a KPI:
 - ✓ Select a KPI report from drop-down box 1
 - ✓ Select a KPI Colour
 - ✓ Click “Search KPI”
 - Data is filtered to show records that meet the colour criteria for the selected report.
 - It remains possible to switch between KPI reports and colour results in KPI filter mode. Following a change to each filter request, click “Search KPIs” to refresh data.
 - ✓ To clear all KPI filters, click “Clear KPIs”.
- ▶ These filtered views may also be accessed directly from the home page fleet status tool.



▶
4.3.10. Browse Table Column Header Features

- ▶ There are 2 useful features housed within browse table column headers, these are:
 - ✓ Column Sorting
 - ✓ Column Filtering

▶ **Column Sorting:**

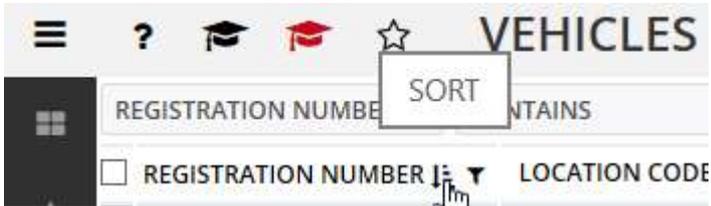
- ✓ The column sort feature is represented by the below icon:



- ✓ It's possible to choose a single data column by which to sort our data in either ascending order or descending order.
- ✓ In the below example, there is a default setting to sort the Vehicles browse table by ascending "Registration No."; this is indicated by the sort icon as follows:



- ✓ Clicking directly on the sort icon within the sorted column header, reverses the column sort order from "Ascending" to "Descending"



... and the sort icon will also reverse to reflect the new "Descending" order:



- ✓ Equally, we can change the sort column by clicking on any other column header to sort by that data in either "Ascending" or "Descending" order.

- "Ascending" (from smallest to greatest) 
- "Descending" (from greatest to smallest) 



► **Browse Column Filters**

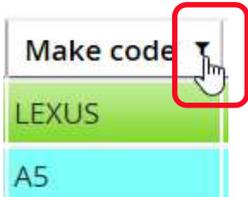
- ✓ Browse table columns may be directly filtered, the column header filters are represented by the below filter icon:



- ✓ Unlike the standard search and filter feature, we can use column header filters to filter within multiple columns at the same time. The result for multiple filter columns is to generate a filter within a filter.
- ✓ The default setting for all columns is “un-filtered”. There are no filters applied in the below example.

Registration No.	Vehicle Type	Vehicle status	Make code	Model code	Fuel Type
258258	COMPANY CAR	Live on Fleet	LEXUS	IS DIESEL SALOON	DL
AA191ABC	VAN	In Garage	A5	Continental	B20
AB11ERD	VAN	For Sale	AUDI	A3 DIESEL SPORTBACK	DL

- ✓ To filter column data:
 - Click directly on the filter icon in the column header of the data to be filtered



- FleetWave opens a pop-up filter feature

Basic Filter
Custom Filter

Search

Append Selection to Filter

Select all

- A5
- AUDI
- BMW
- CARTWRIGHT
- CITROEN
- D6
- DAF
- DON BUR
- E8
- FHAUF/LAWRENCE DAVID
-

**** Above list shows top results only. If you cannot find the value you require use the search box to narrow the results ****

APPLY FILTER
CLEAR FILTER
CLEAR ALL FILTERS
CLOSE



- ✓ There are two (2) column filter modes, these are:
 - **Basic Filter** – provides a radio set of unique data values. Users can select data values by which to filter by checking all relevant boxes
 - **Custom Filter** - Custom filters allow us to filter data using up to 2 Boolean statements



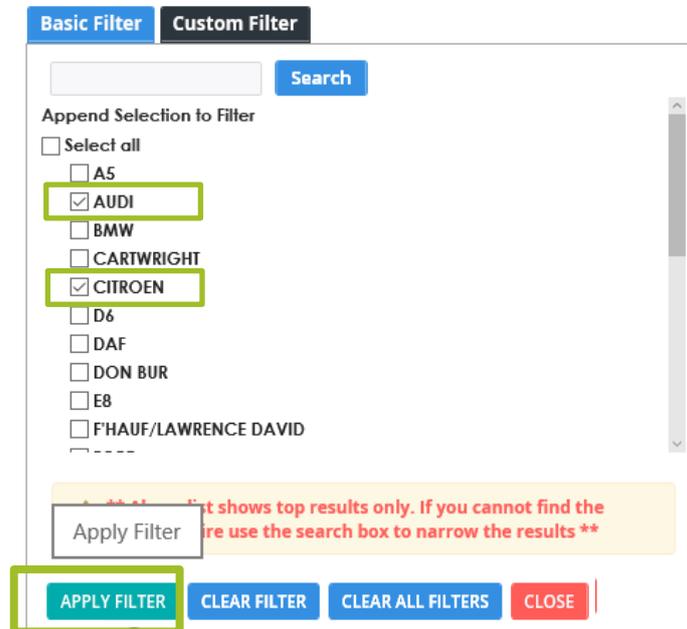
✓ How to Apply a Basic Filter:

- The basic filter options look like this:

- At the top, we see a search feature and a series of unique data values by which the selected data column may be filtered.
- If there are too many different data values to display on screen, a vertical scroll bar appears to the right of the basic filter.
- Occasionally, the list of data values is too long to render all values using the vertical scroll feature. When this is the case, FleetWave initially displays the most searched for data values (or “top filter results”). If you can’t see the data option you are looking for, you may use the search feature to narrow the visible options.

**** Above list shows top results only. If you cannot find the value you require use the search box to narrow the results ****

- To apply a basic filter, simply check the box(es) of the required filter data values then click “Apply Filter”. We can check one or many boxes as needed.



- Following “Apply Filter”, FleetWave closes the column filter pop-up and adds a filter to the column as selected. In the below example, we have now filtered the “Make Code” column in Vehicles to display just “Audi” and “Citroen” vehicles.

Registration No. ▼	Vehicle Type ▼	Vehicle status ⚡ ▼	Make code ▼ ✓	Model code ▼
BT06CTZ		Live on Fleet	AUDI	A4 2.0 TDI SE
VE05KVO		Live on Fleet	AUDI	A4 2.0 Tdi SE
VF55AFJ		Live on Fleet	AUDI	A4 2.0 Tdi SE Auto
VK55OXE		Live on Fleet	AUDI	A4 2.0 TDI SE
VK55OXF		Live on Fleet	AUDI	A4 2.0 TDI SE
P439SWT		Out of Service	CITROEN	600
R890HCN		Out of Service	CITROEN	600

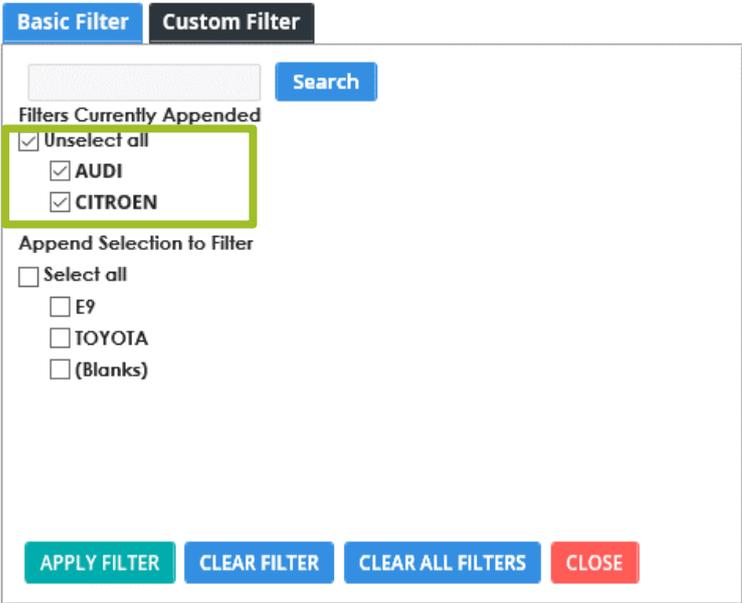
- Note how FleetWave applies a tick in the filtered column header. This is a simple but important feature because, whilst in the same continuous login session, FleetWave will continue to remember all applied browse filters. The tick provides a visual indicator to the user that a filter is applied to a column as you navigate your FleetWave product.



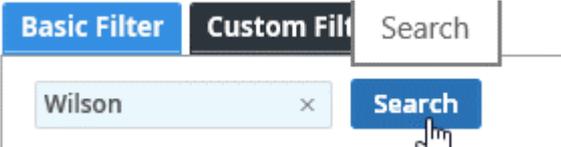


✓ **To Search for a Basic Filter Value:**

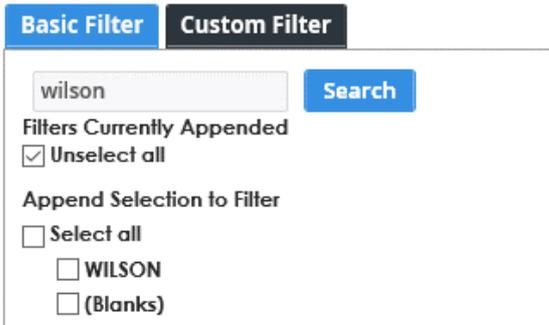
- Let’s demonstrate this by opening our already filtered Make Code column; click to open the Make Code column filter. Our basic filter window now displays the currently appended filter criteria. Notice that there is now an option to unselect applied filters:



- Further filters can be appended by checking additional available values to append. To append a value that is not visible, you will need to search for that value.
- If you need to search for a value that is not visible within the basic filter list, simply type a search value into the search box and click “Search”...

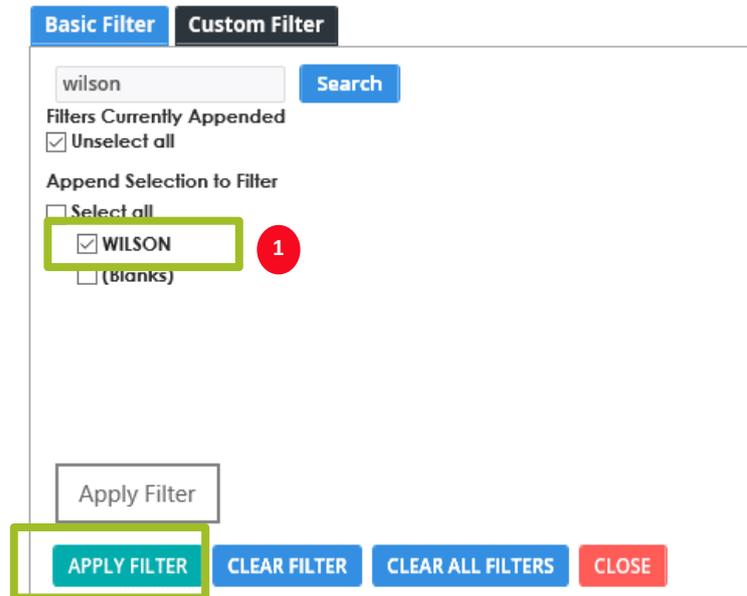


- FleetWave renders all selectable values that match your search criteria.



Please note: if other columns are also filtered, your search may not return the values you expect if these values have already been removed by other filtered columns.

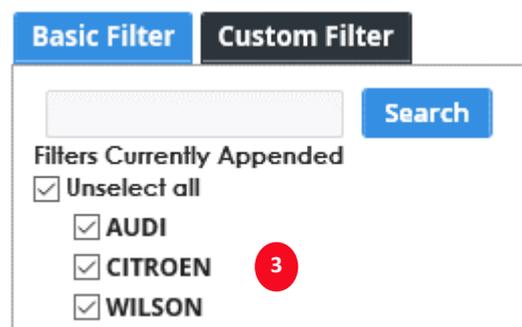
- To append additional filter values, simply check the boxes of the value(s) you wish to append to the basic filter criteria then click “Apply filter”. We can check one or many boxes as needed (1).



- The Browse table now shows the additional Make Code of Wilson (2):

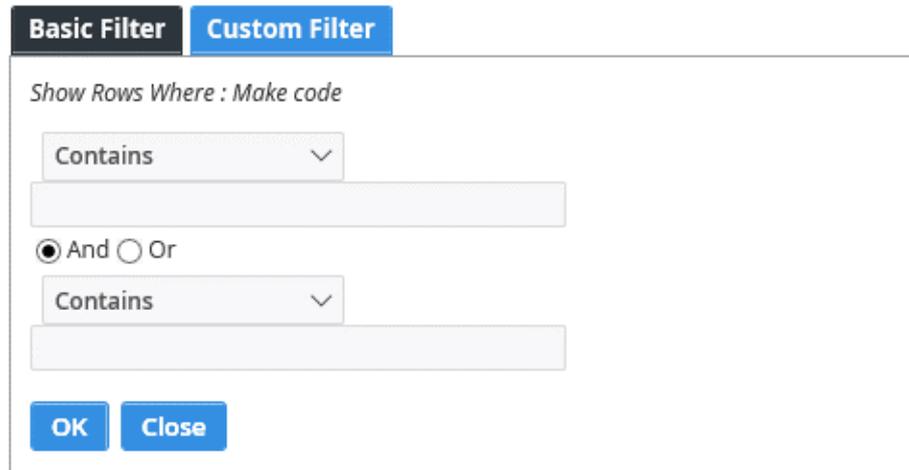
Registration No. ▾	Vehicle Type ▾	Vehicle status  ▾	Make code ▾ ✓
  FD15YHU	VAN	DAMAGED	AUDI
  TRAINREG4	COMPANY CAR	In Garage	CITROEN
  TRL1315	TRAILER	Live on Fleet	WILSON

...and if we open the basic filter for the same column name again, we can see all three (3) make codes appended to the filter criteria:

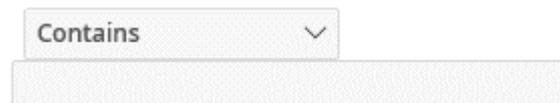


✓ **To Apply a Custom Filter:**

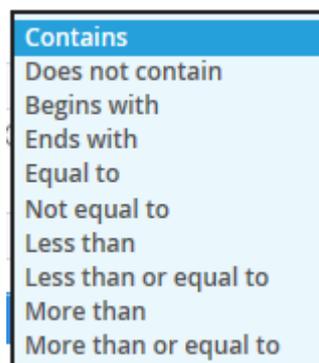
- The custom filter option looks like this:



- To open the customer filter section, click to open the browse column filter then select the “Custom Filter” tab.
- The custom filter option allows users to create up to 2 custom filter expressions for each browse column.
- Each expression consists of a Boolean operator and a filter value:

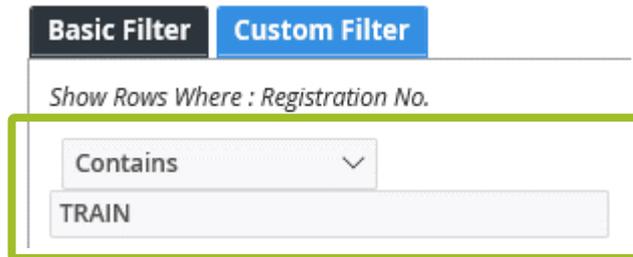


- The following Boolean expressions are available to select from the drop-down list:



The default operator is “Contains”

- Select the operator that best suits your filter criteria then enter a filter value in the expression box. A filter value can be an exact filter search value or a partial value string, depending on the operator selected.



Above is an example of a Custom Filter for the “Registration No.” column of a vehicle browse table. Here, we are asking the filter to return all vehicle registration plates that contain the text string “TRAIN”.

- Click “OK” to apply the Custom Filter:



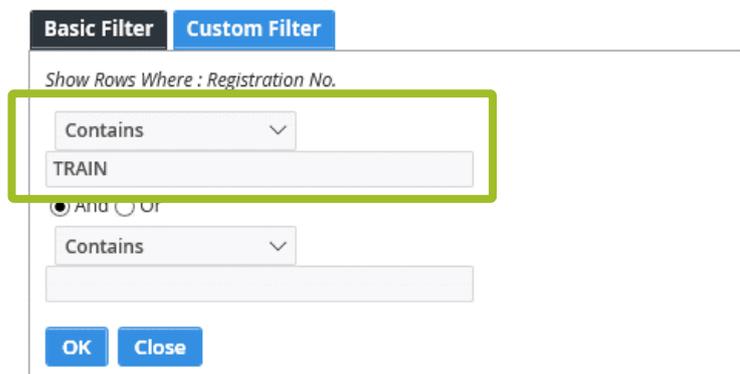
- Given the Basic Filter that is already in place for the Make Code column, the filter result is just one vehicle record:

Registration No. ▼	Vehicle Type ▼	Vehicle status <u>I</u> ▼	Make code ▼	Model code ▼	Fuel Type ▼
TRAINREG4	COMPANY CAR	In Garage	CITROEN	C3	DL

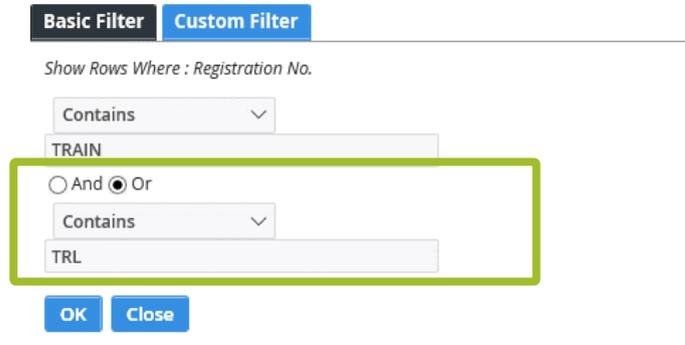
Note how applying a Custom Filter also places a visual “tick” in the browse table column header.



- We can also continue to append to this filter by adding a second filter expression. Click to open the column filter again and select the “Custom Filter tab”. FleetWave remembers the details of your original Custom Filter:



- Let's now extend the filter criteria by also looking for Vehicles with TRL in the registration plate.



Basic Filter Custom Filter

Show Rows Where : Registration No.

Contains

And Or

Contains

OK Close

In the above example, I have added a second expression to filter for vehicles whose registration plates contain a "TRL" string. When using 2 Custom Filter expressions, it's essential to define the relationship between the expressions. The options are:

- "And"
- "Or"

Given that it is unlikely for a registration number to contain both "TRAIN" and "TRL", the "Or" connector has been applied.

- Click "OK" to apply the Custom Filter change:



- The vehicle browse table now shows all records for vehicles whose registration plates reflect the selected Customer Filter Criteria.

<input type="checkbox"/>	Registration No. <input type="text"/>	Vehicle Type <input type="text"/>	Vehicle status <input type="text"/>	Make code <input type="text"/>	Model code <input type="text"/>	Fuel Type <input type="text"/>
<input checked="" type="checkbox"/>	TRAINREG4	COMPANY CAR	In Garage	CITROEN	C3	DL
<input checked="" type="checkbox"/>	TRL1315	TRAILER	Live on Fleet	WILSON		
<input checked="" type="checkbox"/>	TRL1316	TRAILER	Live on Fleet	WILSON		



▶ How to Clear Column Header Filters:

- ✓ There are several means of removing column filters, in each case the clear filter mechanism works for both basic filters and custom filters.
- ✓ To clear a filter from a single column, open the filter for that column and click “CLEAR FILTER”.

CLEAR FILTER

This will completely remove the filter for the column from which you’ve launched the filter feature. When the filter has been cleared, the tick will no longer appear in the column header.

- ✓ To clear the filters for all columns, open the column filter feature from any browse table column and click “CLEAR ALL FILTERS”.

CLEAR ALL FILTERS

This will completely remove all column filters. When the filters have been cleared, there will no longer be any filter ticks available in any browse table column header.

- ✓ It’s also possible to clear all column filters using the standard “CLEAR” feature. This feature works in the following way:

VEHICLE STATUS CONTAINS

- When you click “CLEAR”, FleetWave first looks to see if a standard filter has been applied:

VEHICLE STATUS CONTAINS

If a standard filter value is found, FleetWave will clear this filter value first and ignore the column filters. If the standard filter value is blank, FleetWave will automatically clear the filters from all browse table columns. Where a standard filter was in place, clicking “CLEAR” a second time will find a blank value and subsequently clear all column filters.

▶ Column Filter Summary:

- ✓ Within the same FleetWave session, if you move to another table or area of the system having left filters in place for your current location, your filters will be remembered. However, all filters are removed at point of system log out.
- ✓ It’s possible to place a filter in as many table columns as needed. These will continue to interface with any standard search/filter criteria already applied.
- ✓ Column header filters are additive in nature. E.g. if we filter for Make Code “Audi” and Model Code “A4 2.0 TDI SE”, we will only see vehicle records which satisfy both these criteria.



4.3.11. Data Record Features

- ▶ Data record features are features which appear directly alongside and to the left of the first column for each data row in the browse table.
- ▶ Some data record features are optional and may be controlled through system configuration or through user permissions. Access controlled features may not appear on all browse tables for all users, these features will only be visible to users with the appropriate permissions.
- ▶ Below is a summary of standard record features that may appear in your browse tables:

Feature Icon	Feature Name	Feature Description
	Copy	Click on this feature to create a copy of an existing data record. The copy feature may be configured as single copy mode or multiple copy mode.
	Edit	Click on this feature to edit an existing data record
	Paperclip	This feature indicates that files are attached; click on this feature to browse and open record attachments without the need to open the data record.
	Show/ Hide Details	Click on this feature to show or hide additional detail information for each parent record; e.g. job details.
	No Edit Allowed	This icon indicates that a record is available in “read only” mode only. Users who see this icon will not be able to edit the record. Records can be both temporarily and permanently locked for editing according to user permissions and system workflow configuration.
<input type="checkbox"/>	Data Record	This check box sits to the far left of each data record; if checked, a data record can be selected either on its own or alongside other data records for bulk update, archive or deletion.
<input checked="" type="checkbox"/>	Selector	
	Stock Query	This feature is specific to the “Stock” module. When clicked, it reveals a pop-up which specifies stock quantity by workshop.
	Raise Vehicle	Specific to the Vehicle Orders module, click this feature to raise an ordered and received vehicle into the live Vehicles table.
	Record View Mode	If we hover over any data cell within the browse table and the data within that cell turns blue, the data provides a link. The link in the first column opens the record itself in “Read only” mode. Other link columns will open a “Read only” view to the record in another table that links the two tables.



5. Browse Data Add/Edit/View (AEV)

Add /Edit/View (AEV) Learning Objectives

During this section, participants will gain an understanding of the following:

- 5.1. What is Add/Edit/View?
- 5.2. How to view a data record.
- 5.3. How to add a new data record.
- 5.4. How to edit a data record.
- 5.5. How to archive or delete data records
- 5.6. Data field types
- 5.7. The features of a data record.

5.1. What is Add/Edit/View (AEV)?

- 5.1.1. “Add/ Edit/ View” is how we refer to the different states in which we can view or update data within a FleetWave browse table.
- 5.1.2. Add mode is the state in which we create new data records, complete information and save the new record to a browse data table.
 - ▶ The ability to “add” a new data record is permissions based; users may have different permissions across different data tables.
- 5.1.3. Edit mode is the state in which we can edit or update the fields of an existing data record.
 - ▶ The ability to “edit” a data record is permissions based; users may have different permissions across different data tables.
- 5.1.4. View mode is the state in which we can open and view data for a data record on a “read only” basis.
 - ▶ The ability to “view” a data record is permissions based; users may have different permissions across different data tables.
- 5.1.5. Some tables may have records or data fields that are created as a result of an automated transaction; in some instances, these records or fields may be “read only” to all users.
- 5.1.6. It’s possible to configure your FleetWave application such that 2 users with edit rights are not able to edit the same record at the same time. In such cases, a data record opened by one user may appear locked for editing to another user with edit rights until that record has been closed again.
- 5.1.7. In this section, we will look at the differences between these modes, the features of data records and record archive and delete.



5.2. How to View a Data Record

5.2.1. Where a key value applies, this usually appears in the first column of a browse table. A key value provides a means of unique record identification, e.g. vehicle registration number (VEHICLE_ID_FW). Some tables don't require a key, such as fuel; this is generally true of transaction tables. However, FleetWave applies a unique record number to all table data rows in the background.

<input type="checkbox"/>	REGISTRATION NUMBER	MAKE	MODEL	VEHICLE TYPE	VEHICLE STATUS
<input type="checkbox"/>	123456	BMW	3 SERIES	C	
<input type="checkbox"/>	31JXX6	BMW	3 SERIES	C	SOLD
<input checked="" type="checkbox"/>	AD11EZE	BMW	3 SERIES	C	OFF ROAD
<input type="checkbox"/>	DE16ASD	RENAULT	CLIO	C	LIVE

5.2.2. Hovering over a record value in the first column of the data table reveals a link and should see the text turn blue (see below). Click on this data link to open the data record in "view" mode.

<input type="checkbox"/>	REGISTRATION NUMBER	MAKE	MODEL	VEHICLE TYPE	VEHICLE STATUS
<input type="checkbox"/>	123456	BMW	3 SERIES	C	
<input type="checkbox"/>	31JXX6	BMW	3 SERIES	C	SOLD
<input checked="" type="checkbox"/>	AD11EZE	BMW	3 SERIES	C	OFF ROAD
<input type="checkbox"/>	DE16ASD	RENAULT	CLIO	C	LIVE
<input type="checkbox"/>	EY15Q	MERCEDES-BENZ	C CLASS	C	LIVE

5.2.3. Some data tables hold small amounts of information and all fields recorded within each record may be visible directly within the browse table columns; other data tables, such as Vehicles, may hold much more information behind the record than is visible in the browse table columns. This is true in Add, Edit and View Modes, for example:

- ▶ If we click on a registration number within the "Vehicles" browse table, we reveal the Vehicle data for that record in "view" mode. Data may be organized across multiple tabs, as below.

Specification
Compliance/Diary
Allocations
Accidents
Maintenance
Odometer history
Procurement

REGISTRATION NUMBER	DE16ASD	DRIVER NAME	Adams Brendan	COSTCENTRE	CHEVIN FLEET SOLUTIONS LTD
MAKE	RENAULT	MODEL	CLIO	DERIVATIVE	1.6 DYNAMIQUE 3DR
VEHICLE STATUS	LIVE				

GENERAL

CHASSIS NUMBER	MODEL YEAR	0	NO OF DOORS	0	
EXTERIOR COLOUR	DELIVERY DATE	//	NO OF SEATS	5	
TRANSMISSION	DATE REGISTERED	16/03/2016	VEHICLE TYPE	CAR	
FUEL TYPE	DIESEL	IN SERVICE DATE	//	BODY TYPE	HATCHBACK

Notice how an "edit" feature link is available to the bottom right when in "view" mode. This feature is available to users with edit access rights.



5.2.4. You may notice that some data tables contain link data in other columns. Clicking on these links will open a "read only" view to the associated record of another table in a new window.

5.3. How to Add a New Data Record

5.3.1. Record creation may be access controlled. Users with the appropriate access rights for the open data browse table may add new data records. The right to add data records may differ between FleetWave modules as well as between users or user groups.

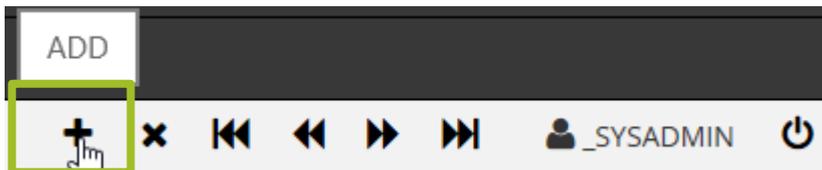
5.3.2. To add a new data record:

- ▶ Open the data browse table by clicking on the module link in the left menu.

✓ Below, the “Accidents” table is used as an example.

ACCIDENT REF	ACCIDENT STATUS	REGISTRATION NUMBER	ACCIDENT DATE	ACCIDENT TIME	DRIVER NAME
AC000010	IN PROGRESS	SP14GHT	02/09/2014	12:34	Walker Peter
AC000005	CLOSED	FP14GHD	03/09/2017	00:00	Santos Gabriele
AC000004	IN PROGRESS	SP14GHT	01/04/2015	00:00	Robinson Christina
AC000003	IN PROGRESS	BW14GHD	22/03/2015	13:00	Wall Samantha
AC000002	IN PROGRESS	FP14GHD	14/04/2015	00:00	Millsip Garath
AC000001	CLOSED	AD11EZE	20/12/2015	15:12	Adams Brendan

- ▶ Click on “+” in the top bar to open a new accident record in “Add” mode.



- ▶ Enter all known and/or required data across all data tabs. All mandatory data fields must be completed as a minimum requirement. Mandatory fields are highlighted below.

- ▶ Once all fields have been completed, click “Save”



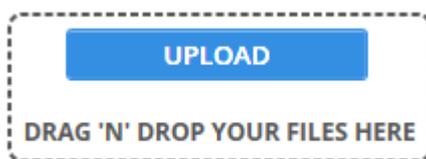


5.3.3. Following the initial “save”, FleetWave may behave in different ways according to configuration:

- ▶ FleetWave may close the record upon “save” and return to the data browse view.
- ▶ The record may remain open after “save” for the user to make further updates. This is often the default behaviour where data records of parent tables hold child data tables that are only rendered active for “AEV” after first “save”. For Example, “Accidents” and “Accident Details”.

5.3.4. In the below example, a new accident record has been saved and an accident reference number has been auto-generated by FleetWave; automated reference generation is possible across many FleetWave tables.

5.3.5. Once a record has been saved for the first time, document upload features also become active. Active upload features allow us to upload documents to our data record when in edit mode. A Drag ‘n’ drop feature can be activated or deactivated by your system administrator, activation is system wide.



5.3.6. At any time, if we close a “saved” data record and navigate back to our data browse screen view, we should see that our new record is listed and visible within the data browse table.

ACCIDENT REF	CONTAINS	SEARCH	CLEAR	F(X)
ACCIDENT REF	ACCIDENT STATUS	REGISTRATION NUMBER		
AC000011	REPORTED	DE16ASD		
AC000010	IN PROGRESS	SP14GHT		

5.3.7. To close a record and return to the browse screen when no additional data needs to be saved, we can:

- ▶ Click “Cancel”
- ▶ Click again on the table link in the left menu
- ▶ Navigate back to table browse using the “HISTORY” feature in the left menu

5.3.8. Sometimes, data dependencies exist where data populated in one data table feeds data into a secondary data table or an embedded view; all such updates are rendered upon “save”.

- ▶ For example, there may be an “Accidents” tab available within the Vehicles module. When a new accident is logged against a vehicle, relevant accident information will populate for that vehicle within the embedded “Accidents” view on the vehicle record.



5.4. How to Edit a Data Record

5.4.1. Record edit may be access controlled. Users with the appropriate access rights for the open data browse table may edit data records. The right to edit data records may differ between FleetWave modules as well as between users or user groups.

5.4.2. To edit a data record:

- ▶ Open the data browse table by clicking on the module link in the left menu.

✓ Below, the “Vehicles” table is used as an example.

REGISTRATION NUMBER	MAKE	MODEL	VEHICLE TYPE	VEHICLE STATUS	COMPANY CODE	COST CENTRE	DRIVER NAME
123456	BMW	3 SERIES	C	...	...	...	...
1JXX6	BMW	3 SERIES	C	...	...	...	...
D11EZE	BMW	3 SERIES	C	...	...	...	...
DE16ASD	RENAULT	CLIO	C	LIVE	CHEVIN	CHEVIN	Taylor Blake
EY15QPS	MERCEDES-BENZ	C CLASS	C	LIVE	CHEVIN	CHEVIN	Adrian Brandon
...

- ▶ Locate the record to be edited. If the record is not immediately visible on screen, use the browse search and filter features, sort your data more effectively using the column sort feature or browse through the pages.

- ▶ Click on the edit feature icon to the left of the record to be edited:

REGISTRATION NUMBER	MAKE	MODEL	VEHICLE TYPE
123456	BMW	3 SERIES	C
1JXX6	BMW	3 SERIES	C
D11EZE	BMW	3 SERIES	C
DE16ASD	RENAULT	CLIO	C
EY15QPS	MERCEDES-BENZ	C CLASS	C

- ▶ FleetWave will open the selected record in edit mode. Update the record and click “Save”.

Specification | Compliance/Diary | Allocations | Accidents | Maintenance | Odometer history | Procurement

REGISTRATION NUMBER: 123456 | DRIVER NAME: Adrian Brandon | COST CENTRE: CHEVIN FLEET SOLUTIONS LTD

MAKE: RENAULT | MODEL: CLIO | DRIVETWE: 1.6 DYNAMIQUE 20M

VEHICLE STATUS: LIVE

UPLOAD

DRAG 'N' DROP YOUR FILES HERE

GENERAL

CHASSIS NUMBER: | MODEL YEAR: | NET OF DOORS: 0

EXTERIOR COLOUR: | DELIVERY DATE: 7/7 | NET OF SEATS: 5

TRANSMISSION: | DATE REGISTERED: 18/03/2016 | VEHICLE TYPE: CAR

FUEL TYPE: DIESEL | IN SERVICE DATE: 7/7 | BODY TYPE: |

Save | Cancel

- ▶ Note: When a record has been opened in “View” mode, users with edit permissions may convert to “Edit” mode by clicking on the “Edit” feature button at the bottom right of the screen.



5.5. How to Archive or Delete Data Records

5.5.1. Often, data archiving and deletion within the FleetWave application is managed through either rule or event automation. However, there may occasionally be a business requirement for a user to manually archive or delete a data record. This may particularly be the case for data tables which control backend lookup information for primary database modules.

5.5.2. It's possible to manually archive or delete one or many data records in a single transaction.

5.5.3. The ability to manually archive and delete data records is access controlled. Users without access to these features will not be able to archive or delete data records. The right to archive or delete data records may differ between FleetWave modules as well as between users or user groups.

5.5.4. Before archiving or deleting a data record, it's advisable to check the status of other data records that may have a level of dependency on the data record in question. For example, it may be important for an accident record to remain live at least for the complete duration of a contracted vehicle hire period or whilst any accident claims remain open. There may also be a business requirement to retain information for report and audit for a designated period of time. This should be defined by your line manager or your business processes.

5.5.5. To Manually Archive Data Records:

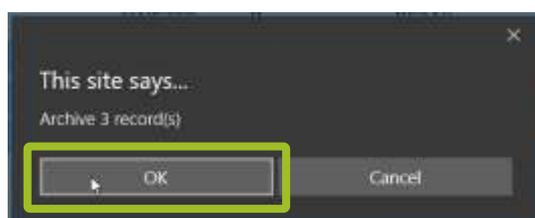
- ▶ Select one or many data records by ticking the checkbox to the far left of each record to be archived. Users without the rights to archive or delete records may not see the check boxes.

<input type="checkbox"/>	<input checked="" type="checkbox"/>	TD40 TRAINER	TD40-TRN	No	FW0865
<input type="checkbox"/>	<input checked="" type="checkbox"/>	STEPHEN DE LAUNAY	0094005	No	FW0720
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RB TEST	RBTEST1	No	FW0828
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RACHEL HURT		No	FW0714
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Peter Aache	PIS002	No	FW0739
<input type="checkbox"/>	<input checked="" type="checkbox"/>	new user 2	trn0909	No	FW0765
<input type="checkbox"/>	<input checked="" type="checkbox"/>	New User	PR9000	No	FW0762

- ▶ Click on the "X" delete feature icon in the top bar:



- ▶ FleetWave launches a pop-up prompt which displays a count of records to be archived. This count should match the number of records selected (or "checked") for archive. To archive the selected record count, click "OK".





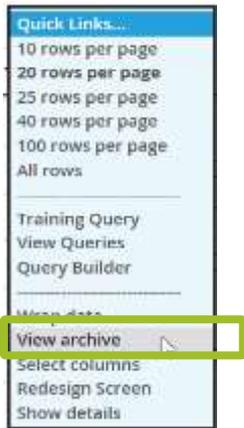
- ▶ All selected data records have now been archived and are no longer present in the live table view. The archived records should now be in the archive data browse view.

- ▶ To view archived data records:

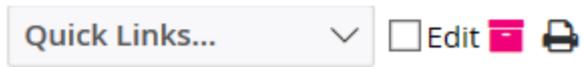
- ✓ Click on the “Archive” feature icon in the standard browse table feature bar.



- ✓ Alternatively, select “View archive” from the quick links drop down menu.



- ✓ In archive view mode, the archive feature toggle icon turns red:



- ✓ The top bar will also indicate that we are viewing archived data:



- ▶ The archived records are now visible in the archive table view:

<input type="checkbox"/>	Driver Name	Payroll No.	Send to dvla	Address 1	Driver ID
<input type="checkbox"/>	RB TEST	RBTEST1	No		FW0828
<input type="checkbox"/>	RACHEL HURT		No		FW0714
<input type="checkbox"/>	Peter Aache	PIS002	No		FW0739

- ▶ The archive view can be closed again by clicking on the archive toggle button a second time or by selecting the “Hide Archive” option from browse Quick Links.
- ▶ If data records have been manually archived in error, they may be “un-archived” by performing the same archive transaction in reverse whilst viewing the records in archive mode.

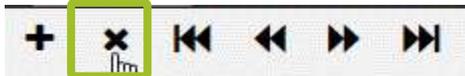


5.5.6. To Manually “Unarchive” Data Records:

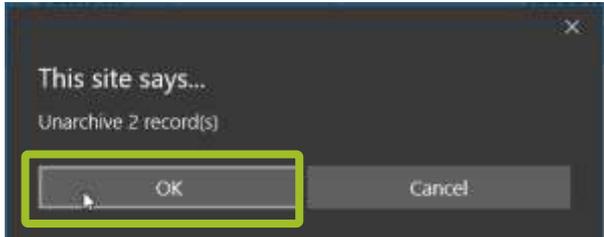
- ▶ Open the archive data view by clicking on the archive toggle button.
- ▶ Select the archived data records to be “unarchived” by checking the boxes to the far left of each record to be “unarchived”.

<input type="checkbox"/>	Driver Name	Payroll No.	Send to dvla	Address 1	Driver ID	Pension ID	Department
<input type="checkbox"/>	RB TEST	RBTEST1	No		FW0828		TRANSPORT
<input checked="" type="checkbox"/>	RACHEL HURT		No		FW0714		
<input checked="" type="checkbox"/>	Peter Aache	PIS002	No		FW0739		OPERATIONS

- ▶ Click on the “X” delete feature icon in the top bar:



- ▶ FleetWave launches a pop-up prompt which displays a count of records to be “unarchived”. This count should match the number of records selected (or “checked”). To “unarchive” the selected record count, click “OK”.



- ▶ All selected data records have now been “unarchived” and are no longer present in the archive table view. The “unarchived” records should now be in the live data browse view again.

Two unarchived records removed from the archive view and relocated to the live browse view:

Driver Name	Payroll No.	Send to dvla	Address 1	Driver ID	Pension ID	Department
<input type="checkbox"/>	RB TEST	RBTEST1	No	FW0828		TRANSPORT

Driver Name	Payroll No.	Send to dvla	Address 1	Driver ID	Pension ID	Department
<input type="checkbox"/>	RACHEL HURT		No	FW0714		
<input type="checkbox"/>	Peter Aache	PIS002	No	FW0739		OPERATIONS

- ▶ If the intention is to permanently delete one or many data records, this can be achieved, depending on application configuration, from either the live or the archive data view.



5.5.7. To Manually Delete Data Records:

- ▶ Select the data records to be deleted (from either the live or archive browse environment) by checking the boxes to the far left of each record to be deleted.

Driver Name	Payroll No.	Send to dvla	Address 1	Driver ID	Pension ID	Department
<input type="checkbox"/> RB TEST	RBTEST1	No		FW0828		TRANSPORT
<input checked="" type="checkbox"/> RACHEL HURT		No		FW0714		
<input checked="" type="checkbox"/> Peter Aache	PIS002	No		FW0739		OPERATIONS

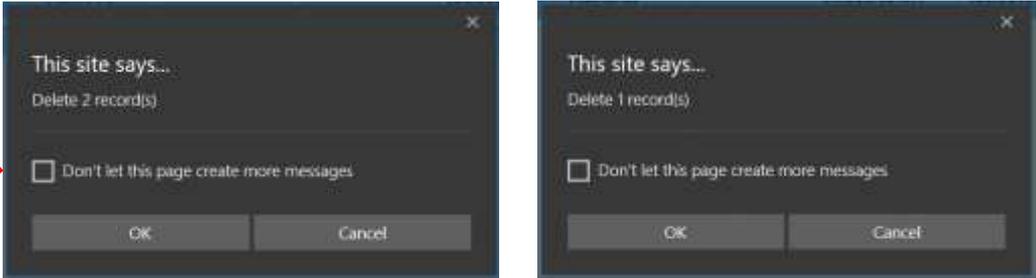
- ▶ Click on the “X” delete feature icon in the top bar:



- ▶ FleetWave will present us with either the “archive” or the “unarchive” pop-up prompt in the usual way. To move to delete the selected data records, we need to click “Cancel” to the prompt.



- ▶ FleetWave then presents us with a secondary prompt for deletion. To delete the selected records, click “OK”, otherwise click “Cancel”.



- ▶ we may click “OK” to the “Delete record” pop-up; this will delete the record immediately and permanently!
- ▶ Click “Cancel” to close the pop-up and stop the record deletion process.



5.6. Field Data Types

5.6.1. Overview

- ▶ This section defines the field data types that might be encountered when adding, editing or viewing data records.
- ▶ It aims to outline the characteristics of each field data type in support of quality data management. It is possible, in FleetWave to import data into any field type as long as the import data format is correct.

5.6.2. Text Fields

- ▶ A Text field is a simple field which may take any text string containing any character type. This includes both alpha and numeric values and may also include special characters.
- ▶ Text fields are usually populated using manual, free text entry.
- ▶ A maximum character string (MAX LEN) may be coded by a system administrator according to specific business requirements.
- ▶ There are no system enforced limitations in relation to the use of special characters by default, but system administrators may restrict special characters if required.
- ▶ Text fields can also be:
 - ✓ Mandatory
 - ✓ Intuitive
 - ✓ Lookup (or **bluetext**) fields
 - ✓ Assigned a “Screen Tip” or “Show Details” feature

For more information on these field qualities, please refer to:

[The Features of a Data Record](#)

- ▶ Text fields may look like this in “Add” and “Edit” modes:

Blank:

Chassis Number

Populated:

Chassis Number

- ▶ Text fields may look like this in “View” mode:

Blank:

Chassis Number

Populated:

Chassis Number



5.6.3. Text Box Fields (Multiline)

- ▶ Text Box fields are also referred to as multiline fields in terms of FleetWave screen design.
- ▶ Text boxes carry all the same qualities as text fields in that they may take any text string containing any character type. This includes both alpha and numeric values and may also include special characters.
- ▶ Text boxes have an additional property which allows for the input of large amounts of text across many rows or “lines”. System administrators can define the size of text boxes in FleetWave screen design by specifying the number of rows and columns that a text box can span. When the amount of text entered within a text box exceeds the number or rows that the text box spans (i.e. text rows exceed the visual limit), FleetWave renders a vertical scroll bar to the right of the text box to allow users to scroll to see additional lines of text.
- ▶ A maximum character string (MAX LEN) may be coded by a system administrator according to specific business requirements.
- ▶ There are no system enforced limitations in relation to the use of special characters by default, but system administrators may restrict special characters if required.
- ▶ Text box fields can also be:
 - ✓ Mandatory
 - ✓ Intuitive
 - ✓ Lookup (or **bluetext**) fields
 - ✓ Assigned a “Screen Tip” or “Show Details” feature

For more information on these field qualities, please refer to:

[The Features of a Data Record](#)

- ▶ Text box fields may look like this in “Add” and “Edit” modes:

Blank:

Sold Comments

Populated (text does not exceed visible rows):

Sold Comments

This is an example of a text box. This example shows a small amount of text and as such, no vertical scroll bar is visible to the right hand side.

Populated (text exceeds visible rows):

Sold Comments

This is an example of a text box. This example shows an amount of text which exceeds the number of visible data rows and as such, FleetWave has rendered a vertical scroll bar to the right hand side.

Text
Text



5.6.4. Numeric Fields

- ▶ Numeric fields may also be referred to as integer fields in FleetWave screen design.
- ▶ Numeric fields are designed to hold numbers (or integers). They may be configured to take simple numbers, decimal numbers, comma separated numbers or character limited numbers. Fields which are looking for a simple “year” entry are likely to be numeric fields limited to 4 characters.
- ▶ Numeric fields may be culturally translated according to global log-in language settings. For example, decimalised numbers may be in 00.00 format or 00,00 format. FleetWave supports numeric rendering formats for many cultures.
- ▶ The numeric default value is zero (“0”) rather than [BLANK]; if no specific value has been entered into a numeric field of a data record, the value of that field will be set to zero (“0”).
- ▶ Numeric fields can also be:
 - ✓ Mandatory
 - ✓ Lookup (or **bluetext**) fields, either pulling data directly from another data record or as a rendered calculation based on several other data records and/or fields.
 - ✓ Assigned a “Screen Tip” or “Show Details” feature

For more information on these field qualities, please refer to:

[The Features of a Data Record](#)

- ▶ Numeric fields may look like this in “Add” and “Edit” modes:

Blank Simple Numeric limited to 4 characters:

Year of Manufacture

Populated Simple Numeric limited to 4 characters:

Year of Manufacture

Blank Decimal Numeric (UK format):

Excess Charge

Populated Decimal Numeric (UK format):

Excess Charge

An example of numeric fields as calculating **bluetext** values (view only):

Estimated Odometer	0.0
MPG	0.00
L/100km	0.00



5.6.5. Combo Box (Drop Down Lists/ Value Lists)

- ▶ A combo box field is a field which renders a drop-down list; this may also be referred to as a value list.
- ▶ A value List, or drop-down box is a type of text field which has a pre-determined set of values assigned to it to provide a selection list. In FleetWave, the contents of a selection list may be determined in one of 3 ways:
 - ✓ The list can be provided by other data tables which act as a data lookup source; this is true for many combo box value lists on the vehicles table as part of the core product, for example.
 - ✓ A value list can be hard coded directly within the administrative screen design area.
 - ✓ A value list can be generated by customer administrators using POPCOMBOLOOKUPS. More information is available in training content for system administrators.
- ▶ How to use a combo box type field:
 - ✓ Simply click on the arrow to the right of the field to reveal the drop-down value list
 - ✓ Click on a value to select it.
- ▶ To delete values from a value list
 - ✓ Click on the drop-down arrow and select the “empty” or “blank” option at the top of the list.
- ▶ Combo box fields can also be:
 - ✓ Mandatory
 - ✓ Lookup (or **bluetext**) fields
 - ✓ Assigned a “Screen Tip” or “Show Details” feature

For more information on these field qualities, please refer to:

[The Features of a Data Record](#)

- ▶ Combo box fields may look like this in “Add” and “Edit” modes:

Blank:

Vehicle status



Populated:

Vehicle status

Live on Fleet





5.6.6. Logical Fields

- ▶ In “Add” mode and “Edit” mode, a logical field looks very like a combo box field; these two field types are very different.
- ▶ Logical fields are driven by the Boolean expressions “Yes” (“1”) and “No” (“0”).
- ▶ If no deliberate entry is made, the default value of a logical field is usually “No” (“0”).
- ▶ When clicking on the arrow to reveal the drop-down selection list for a logical field in FleetWave there are only 2 options, “Yes” and “No” [there is no “blank/empty” entry option].
- ▶ Logical fields can also be:
 - ✓ Mandatory
 - ✓ Lookup (or **bluetext**) fields, either pulling data directly from another data record or as a rendered calculation based on a data rule.
 - ✓ Assigned a “Screen Tip” feature

For more information on these field qualities, please refer to:

[The Features of a Data Record](#)

- ▶ Logical fields may look like this in “Add” and “Edit” modes:

Default Value “No” (“0”):

Speed Limiter Fitted

Selected Value “Yes” (“1”):

Speed Limiter Fitted

- ▶ In “View” mode, these options translate into a check box format:

Default Value “No” (“0”):

Speed Limiter Fitted

Selected Value “Yes” (“1”):

Speed Limiter Fitted



5.6.7. Time Fields

- ▶ Time fields are designed to hold time values in relation to your data requirements.
- ▶ Time fields may be configured to present time in either a 12-hour or in a 24-hour format; times may be displayed as follows:
 - ✓ hh:mm
 - ✓ hh:mm:ss
- ▶ The default value of any time field in “Add” mode is “00:00”, not [BLANK].
- ▶ Time fields may also be set to calculate automatically based on specified world time zone codes.
- ▶ Enter a time manually by typing in consecutive time integers and FleetWave will automatically render the time separators (colons).
- ▶ When your cursor is in a time field, pressing the keyboard hotkey “F2” will populate the field with “now” based on the network time of the device from which the transaction is taking place.



- ▶ Time fields can also be:
 - ✓ Mandatory
 - ✓ Lookup (or **bluetext**) fields
 - ✓ Assigned a “Screen Tip” or “Show Details” feature

For more information on these field qualities and the calendar feature, please refer to:

[The Features of a Data Record](#)

- ▶ Time fields may look like this in “Add” and “Edit” modes:

Default Value “00:00”:

Incident Time

Selected Value:

Incident Time



5.6.8. Date Fields

- ▶ Date fields are designed to hold dates in relation to your data requirements.
- ▶ Date field formats may be culturally translated according to global log-in language and culture settings. For example, dates may be rendered in any of the following formats:
 - ✓ dd/mm/yyyy
 - ✓ mm/dd/yyyy
 - ✓ yyyy/mm/dd
- ▶ All editable date fields are accompanied by a calendar feature. Use the calendar feature to select a date, alternatively, a date may be manually entered. When your cursor is in a date field, pressing the keyboard hotkey “F2” will populate the field with “today’s” date.



- ▶ Date fields can also be:
 - ✓ Mandatory
 - ✓ Lookup (or **bluetext**) fields; non-editable date fields do not render the calendar feature.
 - ✓ Assigned a “Screen Tip” or “Show Details” feature

For more information on these field qualities and the calendar feature, please refer to:

[The Features of a Data Record](#)

- ▶ Date fields may look like this in “Add” and “Edit” modes:

Blank:

Date Registered

//

Populated:

Date Registered

24/08/2017

- ▶ In “View” mode, the calendar feature is not rendered:

An editable date field as it might appear in “View” only mode:

Year of Manufacture

1996

A non-editable date field that is rendered as a lookup or calculated bluetext field

Next MOT Due Date

//



5.7. The Features of a Data Record

5.7.1. Overview

- ▶ In this section, we will be looking at specialised features that are available as part of data record screen design. These features are:
 - ✓ Mandatory Field Designation
 - ✓ Screen Help and Tooltips
 - ✓ Show Details
 - ✓ Lookup (**bluetext**) fields
 - ✓ Intuitive Fields
 - ✓ The Calendar Feature
 - ✓ The Document Upload Feature
 - ✓ Parent and Child Relational Embeds
 - ✓ Embedded Tables and Views

5.7.2. Mandatory Field Designation

- ▶ Using the screen design tool, system administrators can choose to designate fields as mandatory. Mandatory fields hold critical data that must be completed before it is possible to successfully save a data record. Any data field type may be coded as mandatory.
- ▶ In “Add” and “Edit” modes, mandatory fields are represented by three vertical dots after the field name and just to the left of the field itself. These dots are usually red in colour, but may also present in other colours according to your branded application schema.

Make code	⋮ D6
Model code	⋮ Laguna
Derivative	⋮ 1.8 16v Authentique Hatchback 5d 1783cc auto

Please note: the above examples are for illustration purposes only.

- ▶ The Registration No. (VEHICLES_ID_FW) field is both a mandatory field and the primary system key field (unique identifier). Once saved, the vehicle ID cannot be changed directly from the data screen of the vehicle record. Formal vehicle re-plating can be achieved using the re-allocate tool.

Registration No.	⋮ AE52KHA
------------------	-----------

- ▶ In “View” mode, mandatory fields appear exactly like any other field:

Make code	D6
Model code	Laguna
Derivative	1.8 16v Authentique Hatchback 5d 1783cc auto

Please note: the above example is for illustration purposes only.

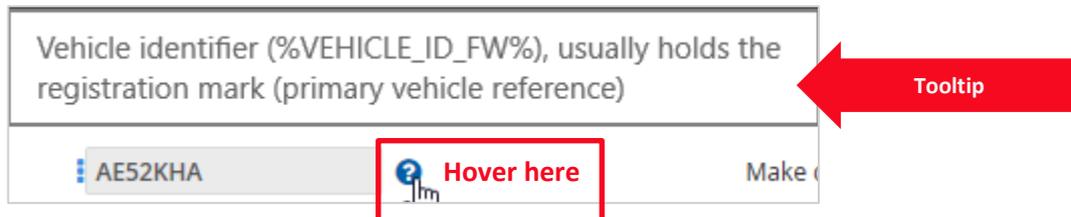


5.7.3. Screen Help and ToolTips

- ▶ Some data fields have screen help and tooltips filed against them. When this is the case, the following “help” icon is visible to the right of the data field in ALL screen modes:



- ▶ Hover over the “help” icon to display screen tooltips.



- ▶ When we hover over this icon, it turns blue, indicating that a link is also present. Click on this link to open FleetWave “Help” pages.

5.7.4. Show Details

- ▶ Some data fields have additional information filed against them. When this is the case, the following “information” icon is visible to the right of the data field in ALL screen modes:



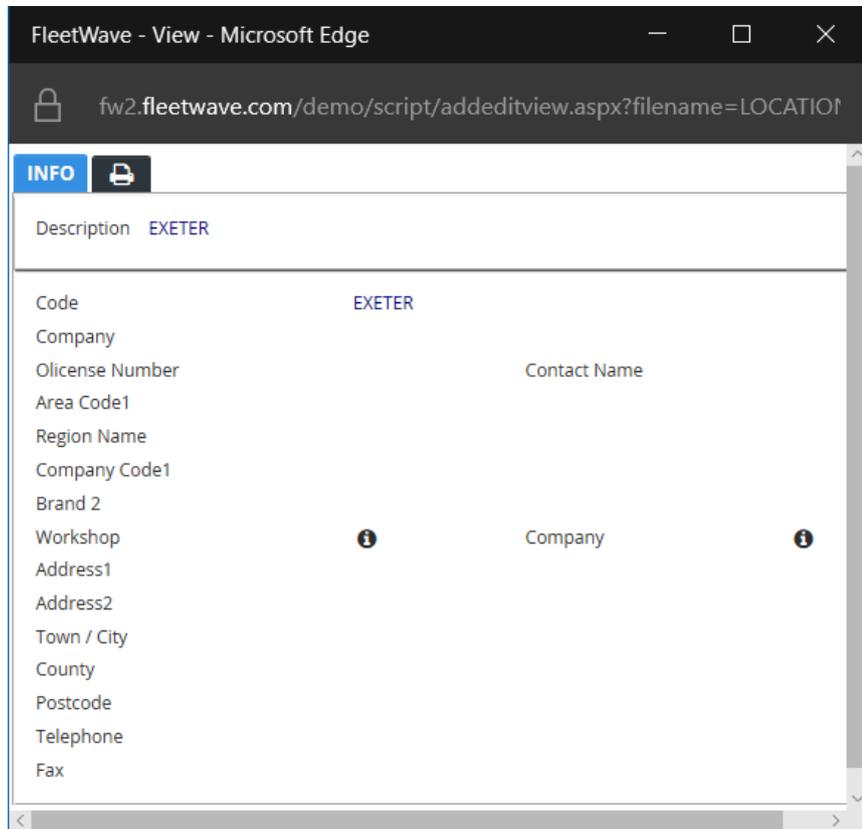
- ▶ If we hover over this icon, it turns blue, indicating that a link is present. Such links are provided against fields whose data is provided by other lookup data tables.



- ▶ Clicking on the “information” icon opens a new window, in “View” mode, to the data record associated with the informational content in the field to the left; showing us the details behind this piece of information.
- ▶ In the above example, the Show Details feature is available against the Location Code field on the vehicles table.



- ▶ Clicking “Show Details” opens a new window and displays the record for the Location Exeter in the LOCATION_CODES_FW table.



- ▶ Data must first be populated in an information field for the “Show Details” feature to work. Therefore, information will only be available for existing records in “Edit” mode.
- ▶ In “Add” mode, there is no data saved against which to search or “lookup”. If the feature is clicked and no data is present, the following on-screen prompt is displayed:





5.7.5. Lookup (bluetext) Fields

- ▶ Some data fields auto-calculate or look up data from other data sources.
- ▶ These fields can't be manually updated. If appropriate source data is available, these values will automatically calculate and/or populate when the data record is saved.
- ▶ These fields are usually populated in bold blue font, but the font may also render in other colours according to your branded application schema.
- ▶ Below are some examples of "bluetext" fields:

Statistics Customised To Suit Your Operation:

Next MOT Due Date	07/12/2009
Next Service Date	/ /
Next inspection	/ /
Replacement By Distance	12/02/2013
Replacement By Time	12/02/2013
Forecast replacement date	12/02/2013 ?

5.7.6. Intuitive Fields

- ▶ Some fields are intuitive; this means that they hold a search lookup feature. For this feature to apply, there is an expectation that a field is to be populated with a value that is primarily stored in another data table. The intuitive nature of the field ensures data entry validation by directing the user to a subset of existing data for selection.
- ▶ One example of an intuitive field might be the requirement to enter a Vehicle ID into a data record that does not belong to the vehicle table but requires the vehicle ID to marry the data record to the associated vehicle. For example, a vehicle ID may need to be added against a fuel record, a maintenance record or an accident/incident record.
- ▶ How intuitive fields work:
 - ✓ Begin typing the data value into the data field box and tab or click away from the field.
 - In the below example, I've entered the text string "TA" into the registration number field of a new defect record. I know that my registration number contains a "TA" text string but I don't know the full registration number by heart.

DEFECTS

Defect	000170
Registration No.	TA <input type="text"/> × ⓘ



- ✓ When I tab away, FleetWave performs a validation check. If a match or several data matches can be located within the Vehicles data table, a filtered selection list will appear.

Registration No.	Vehicle Type	Vehicle status	Make code	Model code	Fuel Type	CO ₂ g/km	RFL Expires	Driver Name
BV07UTA		Live on Fleet	RENAULT	KANGOO ESTATE	UL	190	09/09/2015	
N78RTA		Out of Service	FORD	ES55P		0	25/08/2016	
S61TAV		Out of Service	FORD	190 D		0	15/12/2015	

- ✓ From the search results, we can select a valid data item (e.g. “BV07UTA”) by hovering and clicking on the link (highlighted in blue font).

Registration No.

- ✓ If we enter an unknown text string, our search will return nothing, indicating that the data text string we entered in our original registration number field does not exist in FleetWave. However, we can continue to search from this pop-up.

- Enter filter criteria to locate a valid data value; e.g. “vehicle registration contains TRAIN” and click “Search”.

Registration No. Search Clear Search

- ✓ Once we have selected a valid data value from the search list, our data value auto-populates into our original data field. In the below example, our vehicle registration number has auto-populated within the header for our defect record.

Registration No. Search Clear Search

(12 items)

Registration No.	Vehicle Type	Vehicle status	Make code	Model code
TRAIN1234	VAN		BMW	

DEFECTS

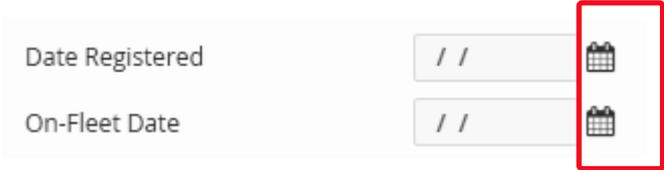
Defect

Registration No.

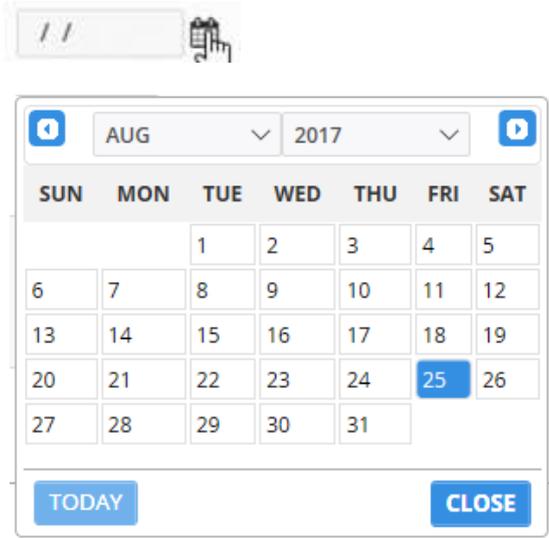


5.7.7. The Calendar Feature (Date Picker Tool)

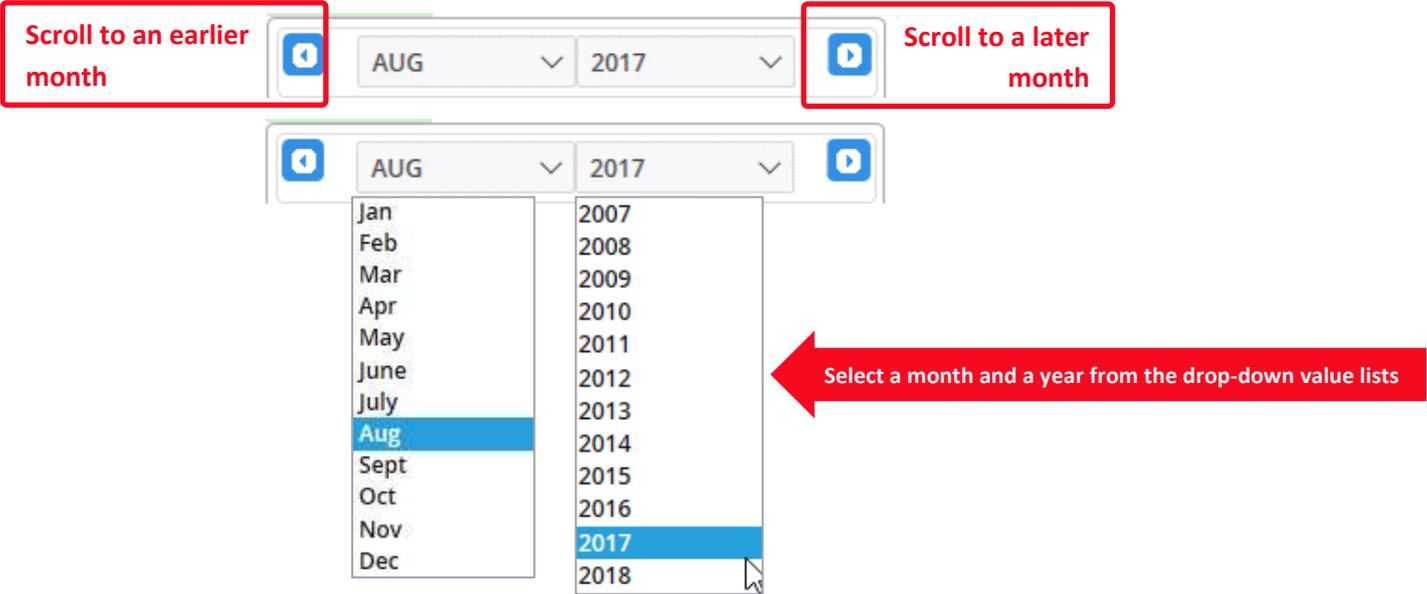
- ▶ All editable date fields are accompanied by a calendar feature (also known as a “Date Picker”) when in “Add” and “Edit” browse modes. This feature appears as a calendar icon to the right of each date field, as below:



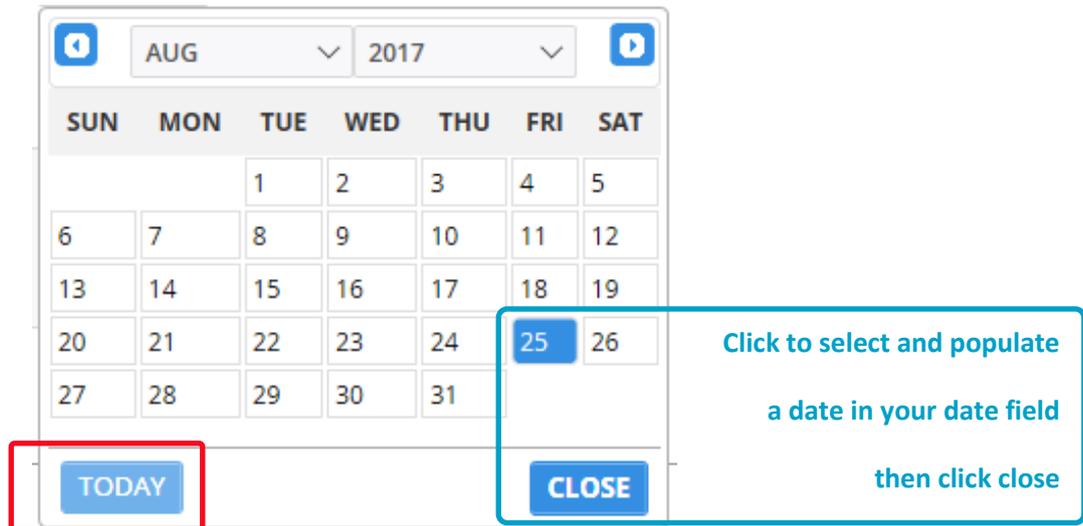
- ▶ Click on the calendar icon to open the feature; below is an example of a calendar feature, this feature may render in different colours according to your branded application schema:



- ▶ Scroll through the months using the little arrows top left and right or select a year and a month from the drop-down value lists.



- ▶ Once you have selected the appropriate month and year, simply click on a date within the displayed calendar month and click “CLOSE” to populate that date within your date field. There is also a “TODAY” feature, clicking this button will jump you to “today’s date” within the calendar date picker tool, but you will still need to click on the date itself to populate today’s date in your date field.



- ▶ Please note that the calendar date picker allows us to select a date up to 10 years in the past (earliest) or up to 10 years into the future (latest). However, dates outside of this range can still be entered in any date field manually
- ▶ To enter a date outside of the calendar range, simply tab or click into the date field and type the date manually. The correct format for a date is always numeric. You may type the numeric date values with or without the date separators as the system is able to auto-populate separators. Year values may also be typed in long or short format; both are recognised by the system. All the below entry strings are acceptable date entries for dates represented in a dd/mm/yyyy format, for example:
 - ✓ 17/02/2015
 - ✓ 17/02/15
 - ✓ 17022015
 - ✓ 170215
- ▶ When your cursor is in a date field, pressing the keyboard hotkey “F2” will populate the field with “today’s” date.





5.7.8. The Document Upload Feature

- ▶ A document upload feature can be made available on any FleetWave table. In standard mode, this feature is represented as an “Upload” button. In the below example, a file “drag ‘n’ drop” feature is also presented, this is an optional configuration to the upload button. It is available in all application release versions from 2.04 and above and is turned “on” as standard.



- ▶ Upload button features are not active in data record “Add” mode. Once a record has been added and saved for the first time, the upload feature button is activated and files may be uploaded.

Inactive in “Add” mode:



Active in “Edit” mode:



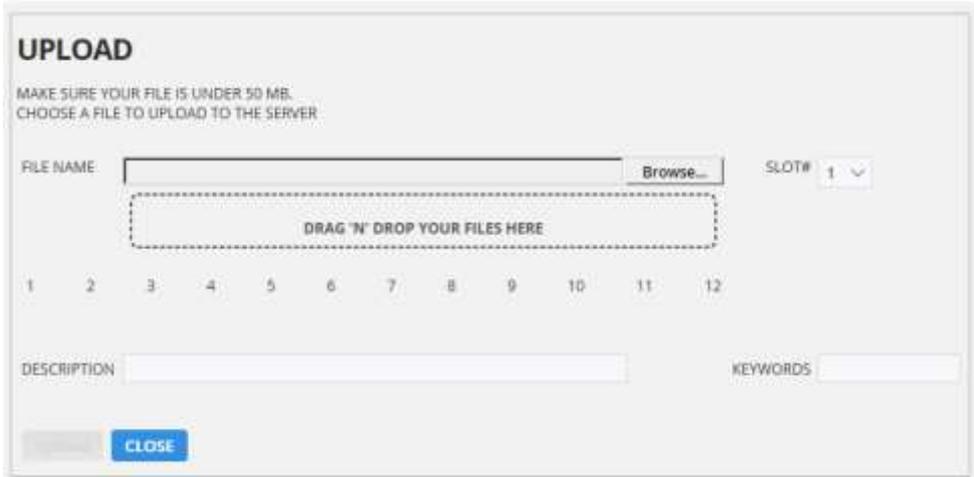
- ▶ Users with record “Edit” permissions are also permitted to upload documents. Depending on your application configuration, it may also be possible for users with “read only” access to be granted permission to upload documents in record “View” mode. If you should be able to upload documents to a record and the feature is not activated for your user ID, please speak with your system administrator.

▶ **How to use the Upload feature button to upload a file:**

- ✓ Click the Upload button



- ✓ FleetWave presents the Upload Browse feature





✓ The Upload Browse feature consists of:

- **A File Browse Feature** – browse to select and upload a file.

FILE NAME

- **An Optional Drag 'n' Drop Feature** – or drag and drop a file to be uploaded here.

DRAG 'N' DROP YOUR FILES HERE

- **A Slot Selector** – whilst a slot number may be manually selected, this is not necessary as FleetWave will automatically select the first or next available (vacant) slot for your file upload.

SLOT# ▾

- **A Series of Slots** - the number of available slots may vary across applications according to system configuration.

1 2 3 4 5 6 7 8 9 10 11 12

- **A Description Field** – FleetWave will automatically assign your uploaded filename to the description value but you may change this manually. This is the value (or file name) that will appear alongside the uploaded file in your FleetWave application.

DESCRIPTION

- **A Keywords Field** – add a keyword at the time of document upload to control who can see the uploaded file.

KEYWORDS

- **An Upload Button** – this is activated following file browse

- **A Close Button** – click to close or cancel out of the “Upload Browse” feature.



✓ To use the “Upload Browse” feature:

- Click “Browse” to locate and select a file from your directory file explorer...

Browse:

File Name Browse...

Select File:



FleetWave populates the file in the File Name Browse field ready for upload:

File Name Browse...

FleetWave renders the upload button “active”:



Please note that the maximum file upload size is 50MB

- In our example, FleetWave has automatically selected slot number “1”, because there are no files uploaded to the selected record yet; slot 1 is therefore the first available (or vacant) upload slot:

File Name Browse... Slot# 1

DRAG 'N' DROP YOUR FILES HERE

1 2 3 4 5 6 7 8

- The file name is automatically captured as the upload browse “Description” value.

Description

You may change this value, if you prefer. The value presented in this field will become the file name within the FleetWave application.

- If you need to keyword the upload file to limit visibility, you must do so before completing your upload. It isn’t possible to add the keyword after upload.

Keywords

If you forget to keyword your file at point of upload, you will need to delete the file and upload it again.

- Once you are happy with your upload configuration, click Upload. FleetWave instantly saves the uploaded file to the record and closes the “Upload Browse tool”.

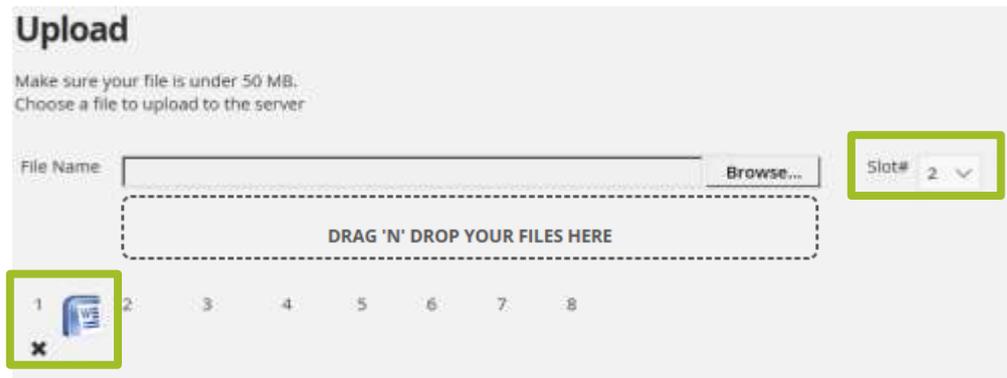




- The uploaded file should be visible on your FleetWave data record screen to the right of the “Upload” feature.



- If we click “Upload” again, we should also see that the uploaded document is now showing in the upload browse feature under slot 1 and that FleetWave is automatically looking to assign the next upload to slot 2.



- To upload more files, repeat the same upload steps.

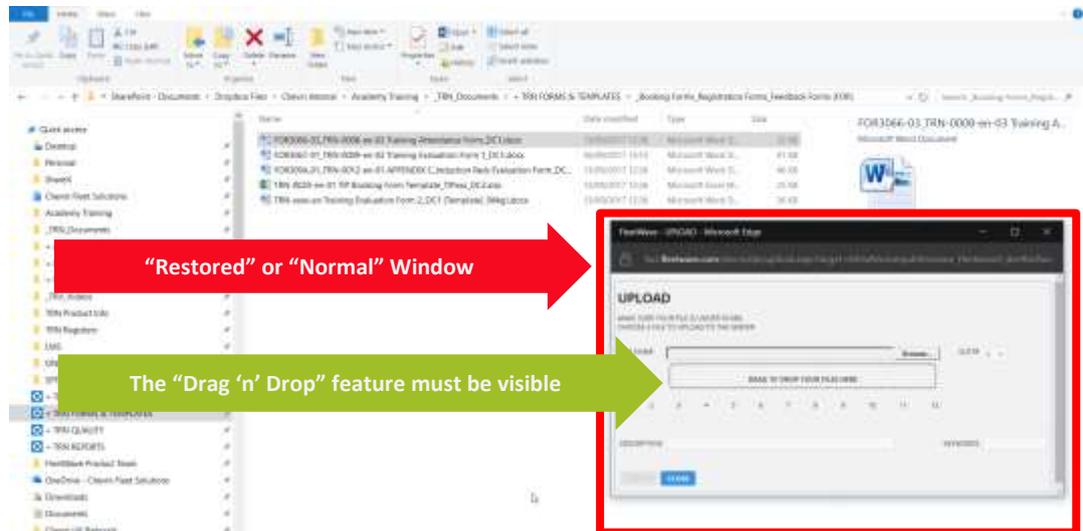
▶ **How to Use the “Drag ‘n’ Drop” Feature to Upload a File:**

- ✓ The “Drag ‘n’ Drop” feature is optional and is available for system administrator configuration in FleetWave applications from release version 2.04 and above.
- ✓ When activated, this feature is available directly around the “Upload” button on your data record screen as well as within the “Upload Browse” feature. The default configuration is “active”.
- ✓ Files may be dragged and dropped either from your local desktop or your file explorer directory. You will need to restore the window of your FleetWave application to its normal (or default size) so that you are able to explore, locate and drag and drop a file into the drag ‘n’ drop area. A “restored” or “normal” window is the state in which the window is neither maximized nor minimized. To restore the window, click on the restore window option in your top right browser ribbon:





- ✓ A “restored” or “normal” window will shrink to a scalable size so that your file explorer directory or your desk top can be made visible in the background. A “restored” or “normal” FleetWave window may appear as below:



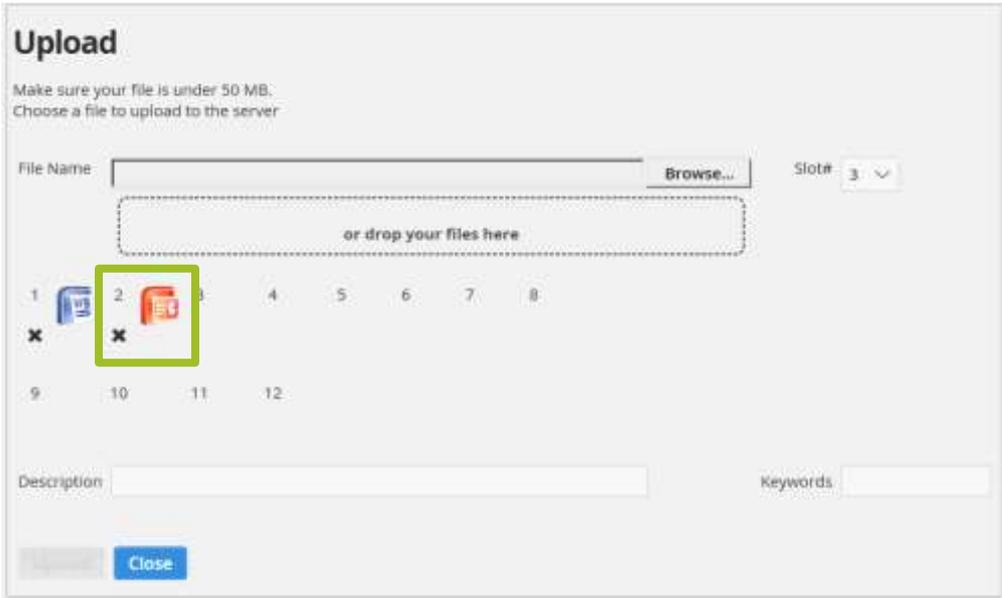
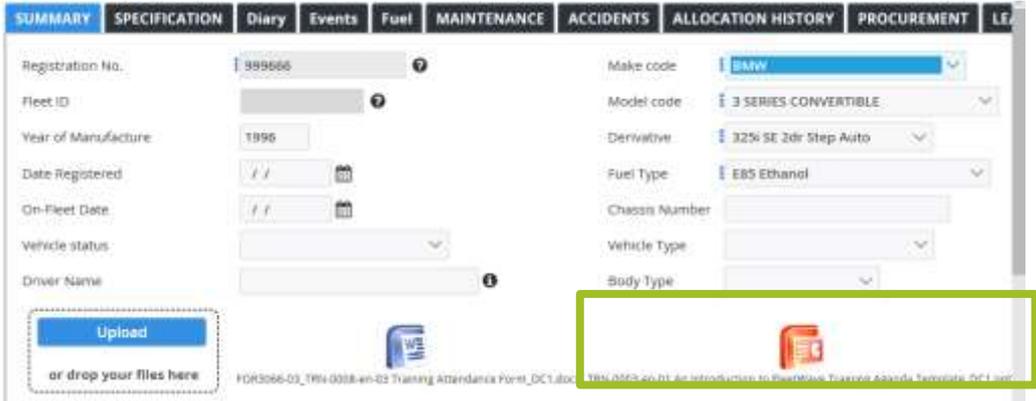
Ensure that your restored window is scaled to a size big enough for the document “Drag ‘n’ Drop” feature to be visible. You can re-scale your window by clicking and dragging on the window perimeter.

- ✓ You may use the “Drag ‘n’ Drop” feature either directly in the main record or in the Upload Browse feature in exactly the same way.
- ✓ Using the Tab+Alt keys on your keyboard, you can now scroll between your open applications to your file browse location. Once located, click Tab+Alt until your “restored” FleetWave application window appears above the browse location from which you wish to drag and drop a file.
- ✓ Using your mouse, left click on the file you want to drag and drop. Keeping the left click mouse button held down, you can now drag your selected file into the drag and drop upload area. Do not release the left mouse button until you have dragged the file to the correct position. The file needs to be dragged inside the dotted line to the point where you can see a rectangular file icon display over your file image:





- ✓ Once the file is correctly positioned, simply release the left click button of your mouse and FleetWave will automatically upload your file to the next vacant slot number.
- In the below example, a training agenda template has been dragged and dropped onto to the same data record that was previously used to upload a file using the “Upload” button. The file is now visible both in the record and at slot number 2:



- ✓ The number of upload slots visible in your document upload browse tool determines the maximum number of files that can be uploaded to your data record. The FleetWave default is 12 files, but this maximum quantity can be changed by a system administrator.





▶ **How to Delete an Uploaded Document:**

- ✓ Click on the "Upload" button to open the upload browse tool.



- ✓ Beneath and to the left of each uploaded file is an "X"; click the "X" to immediately delete a file.

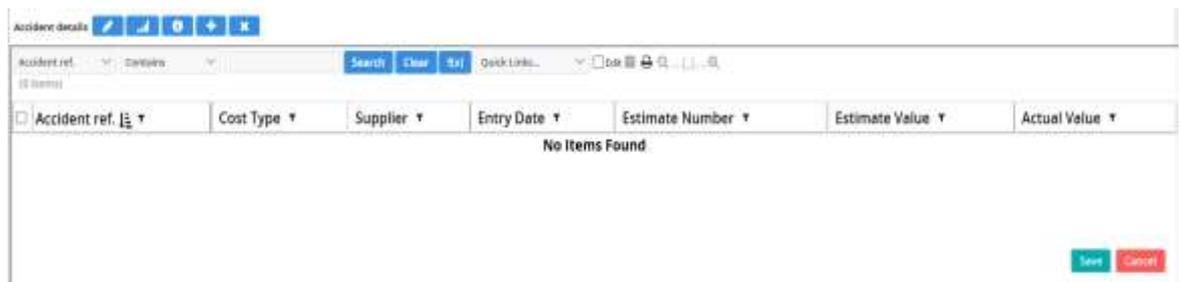


- ✓ FleetWave will save the file deletion and close the upload browse tool; the deleted file should no longer be visible in the data record:



5.7.9. Parent and Child Relational Embeds

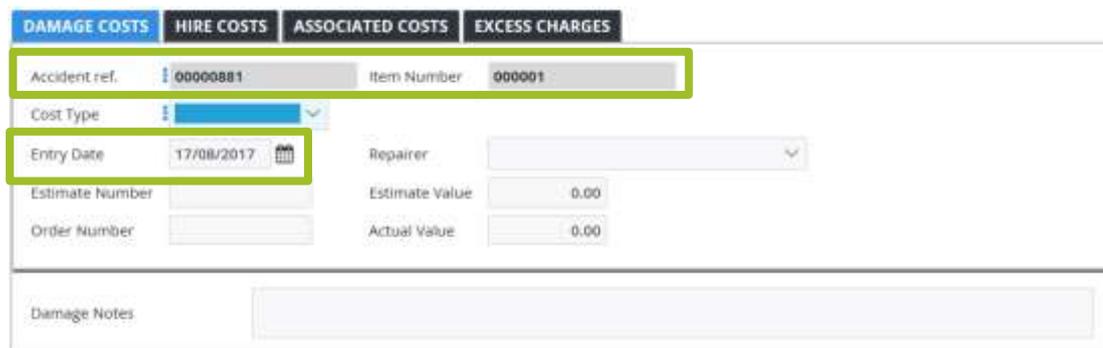
- ▶ Some data tables are considered a parent table for which an inherent parent and child table relationship exists. The Accidents table (ACCIDENT_HEADERS_FW) is one of these. All parent tables house an embedded child (or “details”) table, in this case we refer to the Accident Details table (ACCIDENT_DETAILS_FW). When new records are added to a parent data table and saved for the first time, the embedded details table becomes fully visible and editable according to system configuration. Below is an example of an active Accident Details table embedded within its parent table:



- ▶ Click on the “Add” icon in the “Details” section to add details to an embedded child table:



- ▶ This opens an input screen within the embedded window in “Add” mode to allow the user to create an accident detail record; notice how the accident reference is automatically associated to a details line item number in “Add” mode. In this instance, the entry date of the accident detail is also auto-populating:



The screenshot shows an input form with tabs for 'DAMAGE COSTS', 'HIRE COSTS', 'ASSOCIATED COSTS', and 'EXCESS CHARGES'. The 'DAMAGE COSTS' tab is active. The form contains the following fields:

- Accident ref.: 00000881
- Item Number: 000001
- Cost Type: (dropdown menu)
- Entry Date: 17/08/2017 (calendar icon)
- Repairer: (dropdown menu)
- Estimate Value: 0.00
- Actual Value: 0.00
- Order Number: (text input)
- Damage Notes: (text area)

The 'Accident ref.' and 'Item Number' fields, and the 'Entry Date' field, are highlighted with a green box.



- ▶ Complete the relevant information and click “Save”; in our example, we could complete up to 4 sections of information, only the damage costs have been completed, in this case:

- ▶ This populates a detail record within our main “Accident” parent record:

Accident ref. ID	Cost Type	Supplier	Entry Date	Estimate Number	Estimate Value	Actual Value
00000881	d		17/08/2017	EST1234	82.00	77.20

- ▶ To add more details, repeat the above steps and click “Save”.
- ▶ There are several core tables in FleetWave that have a similar Parent (Header) and Child (Details) relationship. Some of the key relational tables are listed below:

- ✓ **STOCK_PURCHASE_HEADERS_FW** (Purchase Orders) and **STOCK_PURCHASE_DETAILS_FW** (Purchase Details)
- ✓ **ACCIDENT_HEADERS_FW** (Accidents) and **ACCIDENT_DETAILS_FW** (Accident Details)
- ✓ **JOB_HEADERS_FW** (Job Cards/ Maintenance) and **JOB_DETAILS_FW** (Job Details)



5.7.10. Embedded Tables and Views

- Some data records may contain multiple embedded table views across single or multiple data tab(s). These embedded tables do not have the same child relationship to the parent table but they provide a filtered view onto data housed in external tables for the associated parent record. Some embedded tables are read only and are populated within the embedded view following updates to other tables. Others may be edited directly; in which case, editing data within the embedded table ensures that the data is written back to the master table. In some cases, it may also be possible to add records to an embedded table view. Where this is possible, saved records are also written to the master table.

Below are some examples of embedded tables for a vehicle record:

Can Add:

Detailed Fuel Records for this vehicle

Registration No.	Issue Status	Date	Amount	Cost	Price per unit	Fuel Type	Odometer	Location Code	Internal/External
AD52ADV		22/09/2014	35.00	35.00	1.00	Unleaded	30500.0		I
AD52ADV		22/09/2014	25.00	25.00	1.00	Unleaded	31000.0		E

Can Edit:

Job Cards:

The below table displays all "Maintenance" job cards for this vehicle

Job Number	Registration No.	Job Status	Workshop	Reason	Service Type	Job Date	Cost parts	Cost Labour	Total nett
JB100597	AD52ADV	Work in Progress	WKS002	MOT		26/09/2016	0.00	0.00	0.00

Defects:

The below table displays all "Defects" for this vehicle

Defect	Job Number	Registration No.	Defect Date	Driver Name	Notes
000069	J0100420	AD52ADV	09/05/2011		BROKEN HORN
000070	J0100420	AD52ADV	09/05/2011		Broken wing mirror

Read Only:

Accidents:

The below table displays all "Accident" records for this vehicle

Accident ref.	Registration No.	Accident Date	Driver Name	Costcentre	Make code	Model code	Accident Reason	Comment
00000768	AD52ADV	29/11/2012	ADRIAN KERR-DELWORTH	000004	FORD	350 L	CZ	DRIFTED INTO GUARD RAIL

The below table displays all "Allocation" records for this vehicle

Allocations:

Driver Name	Registration No.	Costcentre	Location Code	Department	Start Date	Odometer	End Date	End Odometer	Lock	Workshop
test user	AD52ADV		BELPER	OPERATIONS	13/12/2015	110000.0 //			0.0	
DAVID SMITH	AD52ADV	000005	BELPER		29/01/2012	0.0	12/02/2015		0.0	
ADRIAN KERR-DELWORTH	AD52ADV	000005			01/11/2011	0.0	28/01/2012		0.0	



iv. About This Document



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Chevin Fleet Solutions LLC, registered in United States of America No. 200 643 166 348, 347 Lunenburg Street, Fitchburg, MA 01420-4541

Chevin Fleet Solutions PTY LTD, registered in Australia ABN 91 136 728 606, Suite 2A, 96 Lytton Road, East Brisbane, QLD 4169

Chevin Fleet Solutions bvba, registered in Belgium VAT BE 0524.847.895, Lambroekstraat 5A, 1831 Diegem-Brussels, Belgium.