

# PLANNING FOR USE OF THE BRANCH FEATURE



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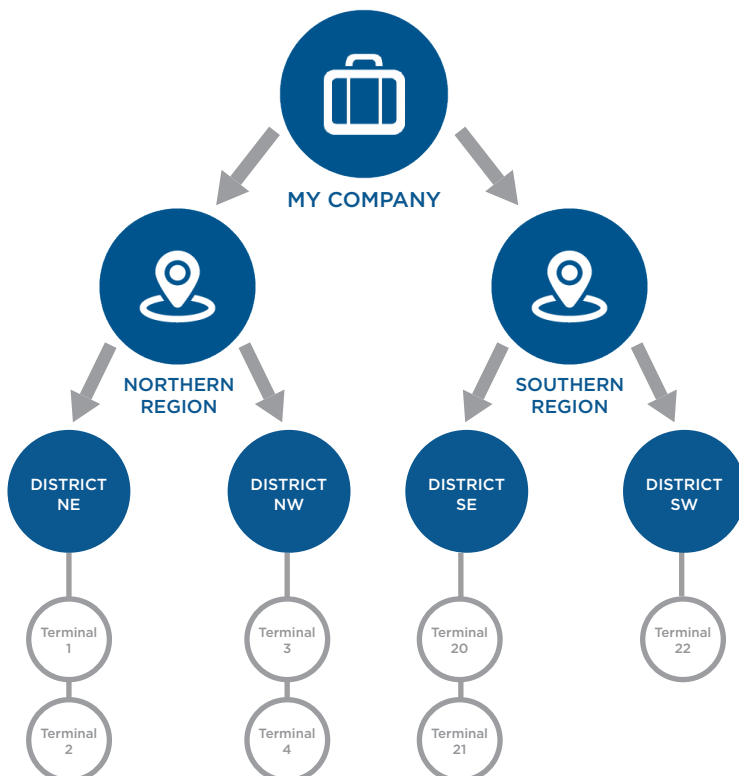
## INTRODUCTION

Fleet Complete allows you to segment your data based on hierarchical branches. If you choose not to use this feature, you will simply have all your data stored in a single branch, and will not see any of the branch-related functions (for current Fleet Complete users, data will be accessed and aggregated as in prior versions as a result). If you choose to use this feature, whether you are a new or existing customer, it is recommended that you plan your branch structure carefully to ensure that your hierarchy meets your needs and that entities are created in the appropriate branch. Although it is possible to move entities between branches after configuration is complete, planning can minimize the need for those movements.

As a rule, global items like entity types (asset types, resource types), work schedules, custom fields, etc. do not belong to branches and so do not need special planning.

**Note:** This document assumes a basic understanding of Fleet Complete concepts and functions (such as POIs, activities, resources, assets, etc.).

**Note:** In Fleet Complete, branches can be either physical (with an actual location) or administrative (no physical location). The information in this document applies to either type of branch.



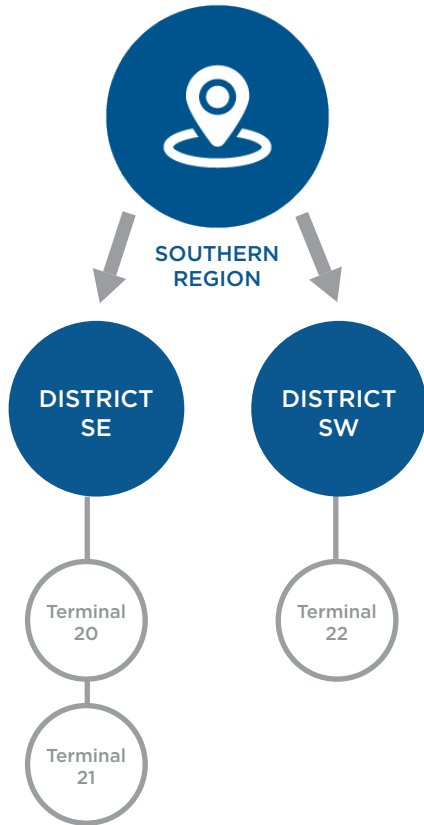
## FUNDAMENTAL BRANCH CONCEPTS

### EXAMPLE HIERARCHY

Branch structure can reflect any hierarchical relationship that suits your needs. For the purposes of illustration, this document uses the following example branch hierarchy based on geographical location.











Entities created here can be shared with branches below



## ENTITIES THAT CAN BE ASSIGNED TO BRANCHES

Note that in the following, consideration is not given to security profiles and data access: what information appears to the user depends on both the entities location in the branch and user access determined by the security profile.

The following entities can be assigned to branches:

-  **Assets:** determines which assets appear on the Tracking screen, are available for activities, are applicable to rules, and have data that appears in reports
-  **Rules:** determines whether events triggered by rules appear to users; further determines which assets and POIs are considered
-  **Canned Messages:** determines which messages can be sent to Garmin devices
-  **POIs:** determines which POIs appear on the Tracking screen, are available for activities, are available to rules, and have data that appears in reports
-  **Resources/crews/service groups:** determines which resources appear on the Tracking screen, are available for activities, are applicable to rules, and have data that appears in reports
-  **Service schedules:** determines which types of maintenance is scheduled for regular performance
-  **Activities:** determines what resource/asset can be dispatched to perform them, but not the location where they can be done
-  **Runs:** determine which runs are available.

## SHARING ENTITIES IN SUBORDINATE LEVELS OF THE HIERARCHY

**For all branch-related entities except rules and assets, entities can be shared with subordinate levels of the hierarchy.**

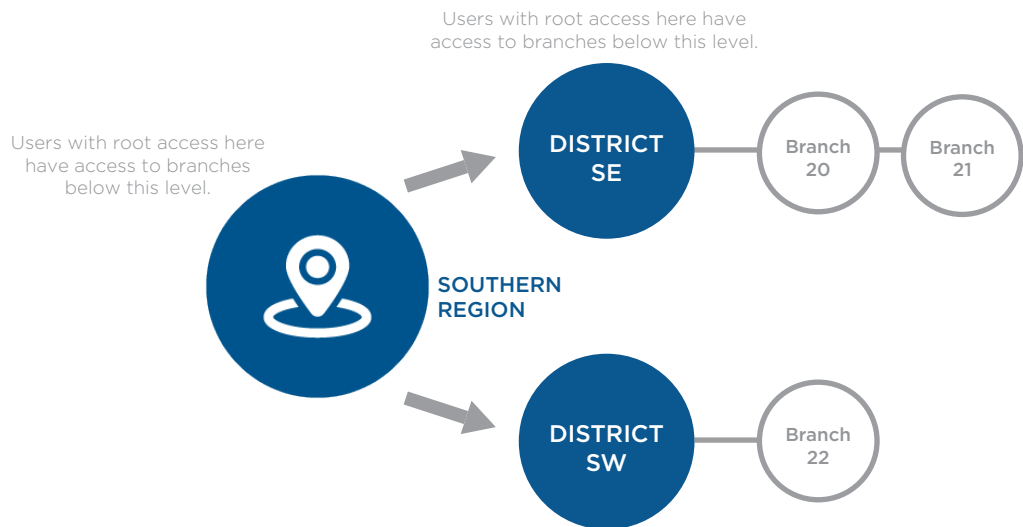
For example, a resource created in the Southern Region can also be available in District SE and District SW (and the terminals within each). Alternatively, a resource created in the Southern Region can be available in the Southern Region alone, not any of its districts.



## BRANCHES AND USER ACCESS

**Users are given access to the branch hierarchy starting at a specific branch (their root access branch).**

For example, a user with root access to the Southern Region has access to entities in District SE and District SW as well as in Terminal 20, 21, and 22. A user with root access to District SE has access to entities created for that district as well as Terminals 20 and 21.



**“Access to entities” means the user can (depending on security profile):**

- 1 See those entities on the Tracking screen.
- 2 See data about those entities in reports.
- 3 Receive alerts related to those entities.
- 4 Communicate with those entities.
- 5 Create activities to be performed by those entities.
- 6 Dispatch activities to those entities.
- 7 Change configuration information for those entities.

**Subordinate branches can be hidden for specific users.**

For example, a user with root access to the Southern Region (which includes District SE, District SW, and Terminals 20, 21, and 22) could have Terminals 20 and 21 hidden from them. This means they would see entities in the Terminal 22 branch as well as entities in the Terminal 20 and 21 branches that are related to a branch that is not hidden. For example, if an asset in Terminal 21 (hidden branch) was associated with a resource in Terminal 22 (visible branch), that resource would be visible in the asset configuration screen, on the Tracking screen, and in reports, but the user could not work with that resource (for example, assign an activity to them).



## **BRANCH-LEVEL INFORMATION THAT AFFECTS ENTITIES WITHIN THE BRANCH**

**Options such as measurement units, time zones, and working hours defined in branches are inherited, by default, by entities created for that branch (although most can be overridden for a specific entity).**

For example, if the Southern Region uses Pacific Time, POIs created in that branch will be set for Pacific Time by default.

**Some options defined at the branch level affect Tracking functions.**

For example, the radius used for the departure notification feature is set at the branch level.

**Statutory or other holidays defined for a branch affect activities, which cannot be dispatched for a holiday day.**

For example, if a branch is closed on November 11, 2012, an activity created for that day cannot be dispatched on that date.

**The custom fields available for entities are limited to those selected in the branch.**

For example, a custom field is used to display a photograph of a POI. If that custom field is hidden in the branch, the field will not appear on the configuration screen for POIs within that branch.

## **CONSIDERATIONS FOR PLANNING**

**Assets** should be placed in branches such that they are grouped together with other assets for which you want to perform similar monitoring, alerting, communication, activity dispatch, and reporting. In a geographic-based hierarchy, this might mean having a branch that includes assets that belong to different geographical areas of your company. In a servicebased hierarchy, this might mean creating branches that group together assets used to perform the same type of service.

**Rules** should be created in the branch of the assets they are meant to monitor.

**Runs** should be created in the branch of the assets to which they apply.

**Canned messages** should be created in the branch of the assets to which the messages will be sent.

**POIs** should be created in, or created above and shared with, the branch of the assets that will be visiting or servicing them.

**Resources/crews** should be created in, or created above and shared with, the branch of the assets they will be assigned to and the service group to which they should belong.

**Service groups** should be created in a branch accessible to the resources/crews operating within those groups.

**Service schedules** should be created in, or created above and shared with, the branch of the assets whose service they define.

**Users** should be given root access such that they have access to the entities they are responsible for monitoring, communicating with, dispatching activities to, or reporting on. If the root access branch results in users seeing branches (and, therefore, entities) not applicable to them, those branches should be hidden.



## EXAMPLE BRANCH PLAN

