

Product Guide

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1 Introduction

In addition to this guide, the product itself contains a lot of helpful information about

each feature. Click on the  icon present on most pages to reveal additional help right where you need it.

You can provide us feedback or suggestions on specific pages or help items by clicking on the icon inside the help box.



Tip: Go through your normal support channels if you require assistance.

If you have suggestions about this Product Guide (the page you are reading now) click on the **Improve this Guide** button at the top.

Some house rules:

- Please don't update the table of contents. We'll take care of that.
- Hyperlinks in the online Product Guide might not work for you. This is normal.
- Your suggestions are visible to others. Don't disclose personal information such as an email address or phone numbers.
- Be nice.

2 Getting Started

2.1 Hardware Installation

To prepare for, perform and verify your hardware installation, please read and follow [this guide](#) carefully. For the Limitations of Use, please visit [this document](#) for the most up to date version.

2.2 Software Setup

Now create a database for your fleet. Use the registration page to enter details like the company name and your email address. Shortly after completing this, you will receive an email confirmation with a link to your database. Click and log in.

Note: Remember that the company name entered in the previous steps is your database name. You will use this information when you log in.

Add your vehicle	Navigate to Vehicles from the main menu. Select Add and then Add vehicle . Enter the Telematics Device serial number and a vehicle name, then click OK . We recommend a vehicle name such as "[Make] [Model] [Year]" or simply the driver's name.
Go for a drive	The best way to see all the great features available to you is by taking your Telematics Device out on its first trip.
View your trip	Log back into your database and select Maps from the main menu. Choose your vehicle from the dropdown menu to have the map show its current location. Select Trips history to see where the vehicle traveled today.

2.3 Supported Software

2.3.1 Browsers

As we continue to innovate, many modern features of the web are integrated into our products. In order use all the advanced functionality of the application, a modern browser is required.

- Modern version of Google Android™
- Modern version of Apple iOS
- Microsoft Internet Explorer® 9+
- The latest versions of Google Chrome™
- The latest versions of Mozilla® Firefox®
- Apple Safari® 6.0+

Note: Some legacy functionality requires the use of a local application (customers with old passive units with downloaders).

2.3.2 Frameworks

- Microsoft .NET Framework 4.5

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3 Vehicle Configuration

The **Vehicles** view (**Menu > Vehicles**) displays the vehicles in your database and allows you to add new vehicles or modify the settings of existing ones.

3.1 Adding a Vehicle

Select **Add** and then **Add vehicle**. The Add Device page will allow you to pair your Telematics Device serial number with your vehicle description. Select **OK** at the top of the page to complete your addition.

3.1.1 Importing Multiple Vehicles

Multiple vehicles can be imported at the same time using the Quick Import tool. Select **Add** and then **Quick import** to open a new dialog. Within the text field, enter one device serial number — along with a brief description of the device — per line.

Click the **Import** button to begin importing your devices.

3.2 Editing a Vehicle

To edit a vehicle, select it from the list. You can edit the device information, driver feedback, or the group(s) to which the device belongs by selecting the appropriate tab.

Note: In most cases, the pre-configured settings for new vehicle installations are suitable.

3.3 Driver Feedback

Audible in-vehicle alerts can improve the on-road driving behavior of your drivers by notifying them of unsafe or potentially risky driving events. You can configure alerts to sound on a number of events including unbuckled seatbelts or speeding. If an event is triggered, the driver will need to correct their on-road behavior for the alert to cease.

Driver feedback helps your organization develop a fleet-wide safety program that works without direct intervention. Your fleet managers can review this information with real-time reporting (see [Reports](#)). Additionally, the system can be configured to send out email or text message notifications to fleet managers when drivers trigger events.

3.4 Groups

Groups are used to organize your vehicles, users, and zones.

To help organize your fleet, you can create groups to separate vehicles into different areas. When you have multiple user accounts accessing the application, users can be given access to all groups or only selected groups. Grouping can be used for vehicle types, regions, managers, or exceptions — the configuration is open to your organization.

For more information on creating new groups and managing existing ones, refer to the chapter entitled [Groups](#).

3.5 Install History

The install history is a report that shows the data that was recorded when the device was initially installed in the vehicle. This can include information such as the date of installation, the name of the installer, and the serial number of the device.

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4 Live Maps

To view the current location of your vehicles on a map, select **Map** from the left navigation bar or click [here](#). Select your vehicle(s) using the search bar. The current position of your vehicle(s) will be displayed on the map.

4.1 Filter

When viewing the map or other components of your fleet, you can easily choose to only view certain groups of vehicles at a time. Use the filter box located in the top left corner of the screen to select which vehicles are shown. Thereafter, the per page filters show options only from your group filter.



Note: The filter is only visible after vehicles have been added to one or more groups. Additionally, ensure that your user account has the proper permissions set by your account administrator to view the selected group using the filter.

4.2 Map options

4.2.1 Searching

The search box makes it easy to find anything from one place. It simultaneously searches:

- Device name
- Drivers
- Addresses
- Zones
- Customers
- Routes
- VIN (Vehicle identification number)

The drop down arrow to the right of the search is used to browse vehicles and groups. Selecting the vehicle will show its current position on the map. You can search for and select more than one vehicle at a time.

4.2.2 Map Dropdown

Views

Select **Map > Views > Save this view** to save specific map views for returning to areas of interest quickly.

Map Type

The application supports a variety of maps which allows you to select the most useful map for your area of interest. You can change the map you use at any time by selecting **Map > Map Type**, then selecting one from the list of available providers.

Refer below for a feature comparison between our map providers. For a more detailed list, visit [here](#).



- Road and satellite maps
- Street View maps
- Supports touch

- Updated daily
- Open source
- Supports touch

Using Custom Maps

The application supports custom maps. This powerful feature allows your organization to design business-specific maps that combine with the application's vehicle information. Some possible usages include maps that show customer-centric information, underground water flow, municipal boundaries, or city infrastructure (power, roads, sewage, etc).

The application supports custom map implementations based on OpenLayers, such as:

- ArcGIS 9.3 REST servers
- MapQuest
- CloudMade
- Tilemill

Get started with custom maps by setting up your own tile or ArcGIS server.

An alternative is to create custom maps based on ESRI shapefiles. For more information about the file format refer to the [Custom Maps Integration](#) document or contact your authorized reseller.

When using the application, all trips, exceptions and zones will appear on your custom maps. After the custom map has been configured, it can be selected for use from **Administration > System... > System Settings** under the **Maps** tab.

Show Legend — Displaying Exceptions

With the map displayed, there is a smart legend at the bottom of the screen that shows color-coded exceptions to assist with identifying problems. The legend itself can be hidden via the map option.

From the legend, individual exceptions can be toggled on and off on the map by selecting the exception name from the legend. (Only exceptions in the view will appear.) Non-exception states such as Stopped, Stopped inside zone, and Driving are always on.

Displaying zones

You can choose if zones are displayed on the map. With the map open, select the **Map** button then press **Show zones** to toggle the visibility of all zones on the map.

Note: Zones are used to denote areas of interest such as customer areas, workplaces or people’s homes and can be used in exception reporting. Refer to the chapter entitled [Zones](#).

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4.3 Tracking

4.3.1 Real Time Tracking

You can select multiple vehicles for display on the map. The map will automatically adjust the zoom level to include all vehicles from your selection on the screen. More information can be obtained by hovering your cursor over the vehicle to display the status, name, and address of the device.

4.3.2 Active tracking

Devices subscribed to an Active Tracking plan will deliver positional updates to the server with a higher frequency. In turn, the maps will show a live animation of the vehicle as it moves.

4.4 Interacting with the map

The map view provides two objects of interaction:

Vehicles	Left-clicking on a vehicle will open a menu with several options pertaining to editing the device, assigning a driver, and finding the address at the current position.
Roads	Left-clicking on a road will open a menu with the additional options

below:

- **Add square zone here:** Create a zone at this location. The zone will be an editable square centered on your selection. You can then name the zone and change its size and shape.
- **Nearest:** Find the nearest vehicles to your selection.
- **Find address:** Displays the street address of your selection. The latitude and longitude will be used if no street address is available.
- **Show street view:** Displays Google StreetView imagery for your selection.

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5 Vehicle Trips

When vehicles are driven from place to place, the application will automatically save records of each trip made. Depending on the vehicle in which your Telematics Device is installed, it will use many different factors to determine when a trip starts and ends.

It is important to understand how a trip is defined. A trip begins when the vehicle starts moving and ends when the vehicle starts moving again after a stop. A stop is recorded when the vehicle ignition is turned off, or when the vehicle has a speed of less than 1 km/h for more than 200 seconds.

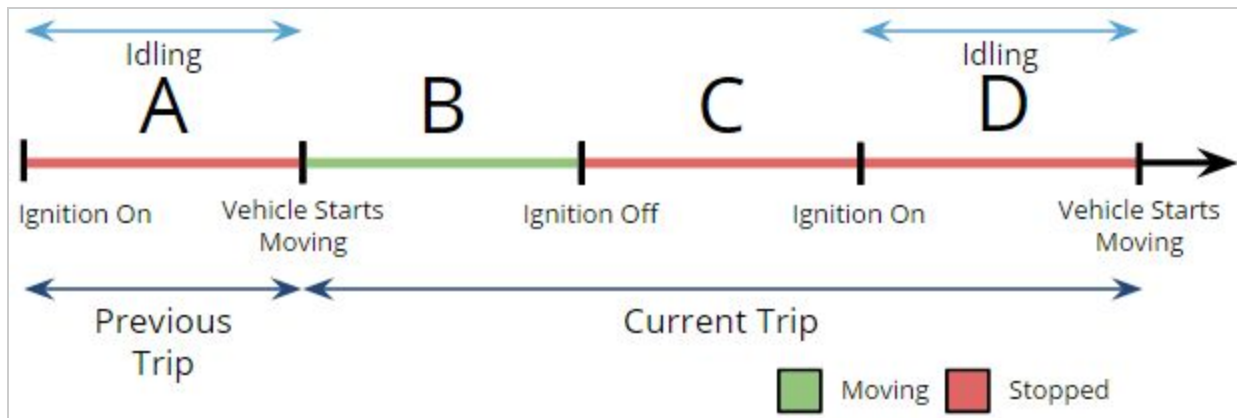
Idling occurs when the engine is running, but the vehicle is not changing position. Idling that occurs before a trip starts is included as part of the idling for the previous trip.

5.0.1 Implications:

- Short stops lasting less than 200 seconds are not counted as stops if the ignition is not turned off (such as stopping for red lights).
- A trip starts the first time a vehicle moves because vehicles may, at any time, be started and remain stationary for a period of time.
- Due to differences in vehicle manufacturers, it may not be possible to determine if the vehicle ignition is turned on or off. If this is the case, your Telematics Device will attempt to detect the engine running based on changes to its current location.

5.1 Examples

5.1.1 Time spent idling before and after driving



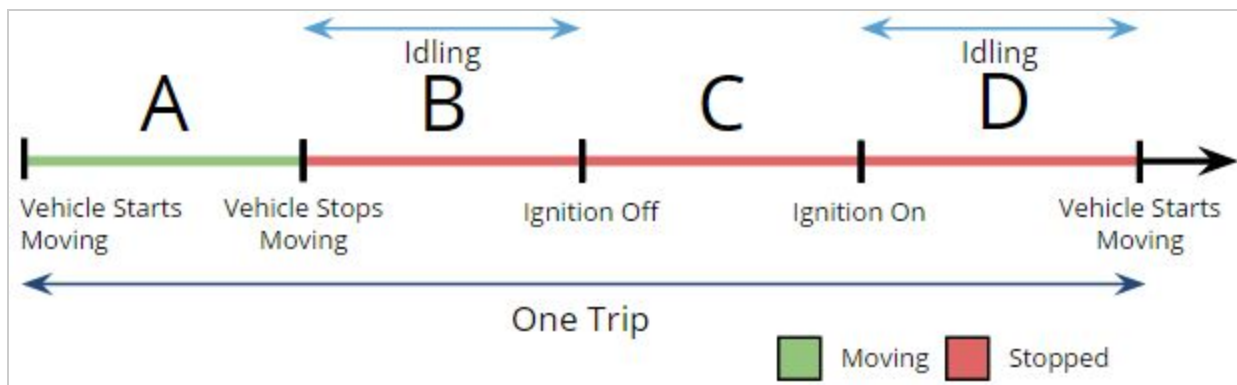
In this example, let's assume time A and D are times spent idling. Therefore:

Previous trip idle time = A

Current trip = B + C + D

Current trip idle time = D

5.1.2 Time spent idling in one trip

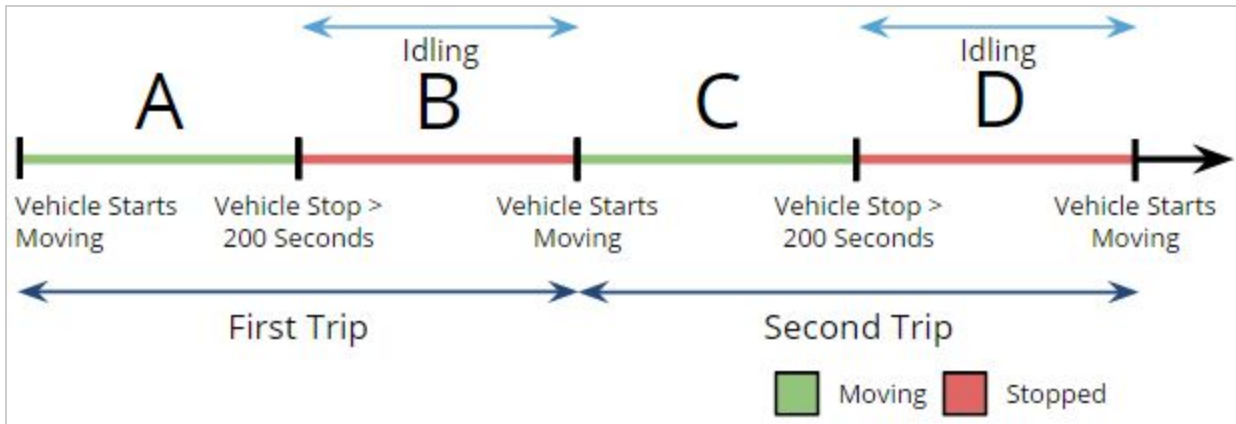


In this example, let's assume time B and D are times spent idling. Therefore:

Current trip = A + B + C + D

Current trip idle time = B + D

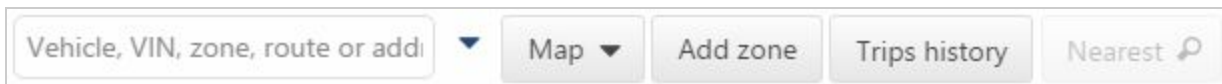
5.1.3 Time spent idling during two trips



In this example, A+B is the first trip, and C+D is the second trip. The idle times are B and D where B is attributed to the first trip, and D is attributed to the second trip.

5.2 Historical tracking

With the application, you have access to the real time locations of your fleet and the entire history of where vehicles have been. You can use this feature to go back in time to examine what happened on a previous date. Select the **Trips History** button to work with historical tracking.



When using Trips History, your selected vehicles will have their trips displayed automatically. The table will show each individual trip as a single row. The first item in the row is the address or zone name at which the vehicle was stopped.

		Stopped	Idling	Driving		
Test Vehicle	Test Group	20h 26m	1m 13s	2h 43m	73km	
Home	from 08:34 to 08:44	10m 32s	5s	5m 55s	2km	
Office	from 08:49 to 09:20	31m 2s	4s	5m 5s	2km	
100 Main St, Toronto	from 09:22 to 09:29	6m 22s	3s	2m 12s	1km	
Bakery	from 09:46 to 10:00	13m 38s	7s	17m 21s	10km	

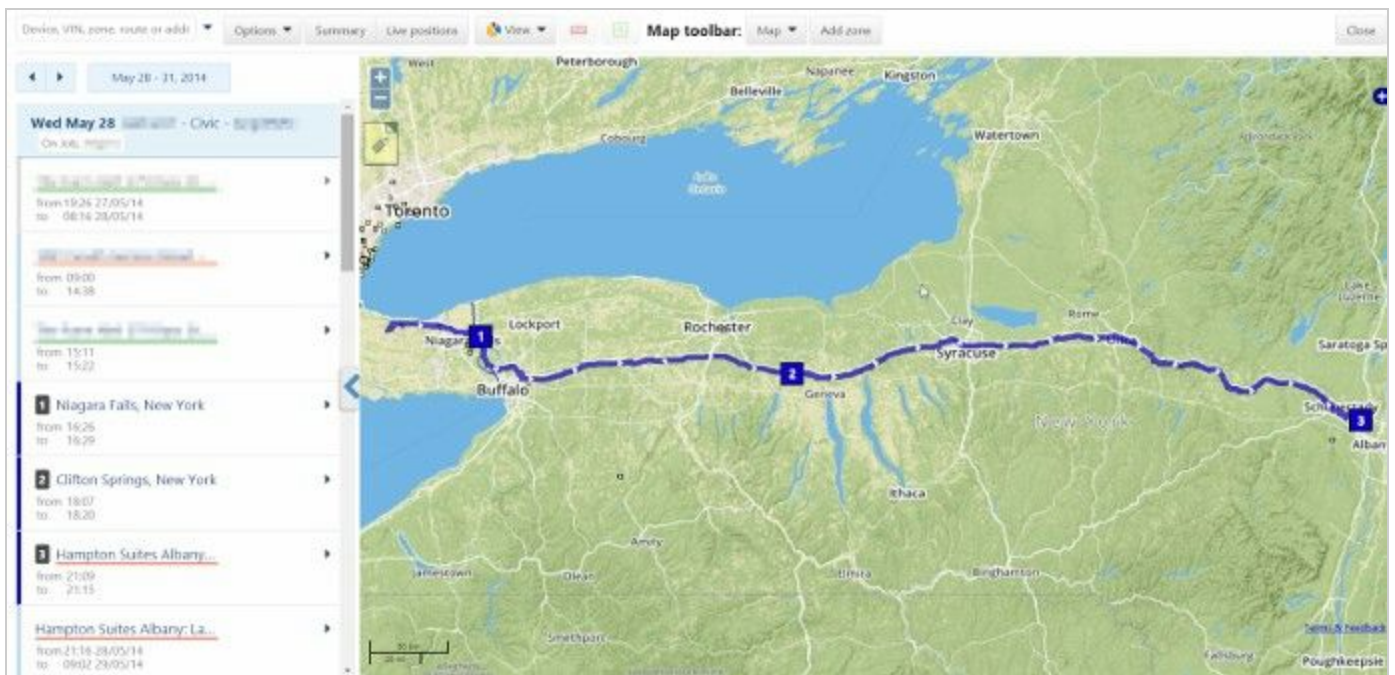
Note: Zone names will be used in place of addresses after you have created zones for customers' locations, workplaces or other places of interest.

If the location is a zone then it will be underlined in a color which corresponds to the type of the zone. The example above shows yellow and green lines for specified zones.

5.3 Mapping historical trips

The list of trips also shows when the vehicle arrived, how long it was stopped for, how long the trip lasted, and the distance that was driven over the course of the trip.

Selecting an individual trip will add the trip to the map. Selecting additional trips will show all of the selections simultaneously. The selected trips need not be consecutive. The selected trips will have a black number to the left of their address or zone name indicating the trip's order in the sequence. The number corresponds to the number on the map. In the example below, 3 trips are selected.



Tip: A shortcut for adding all of the trips for the day is to select the date button.



To the right of the trip is an arrow. Click on this to see options to edit the device, assign the driver, show the speed profile for that trip, or show the accident and log data. These options are discussed in more detail in other sections.

	from 15:24 to 16:35	
	from 16:36 to 16:43	

An automatic legend is shown at the bottom of the map which denotes important events along the trips.

The stops and the exceptions that occurred during the trip are shown on the map. You can filter the exceptions on the map by selecting or deselecting one of the areas from the smart legend.



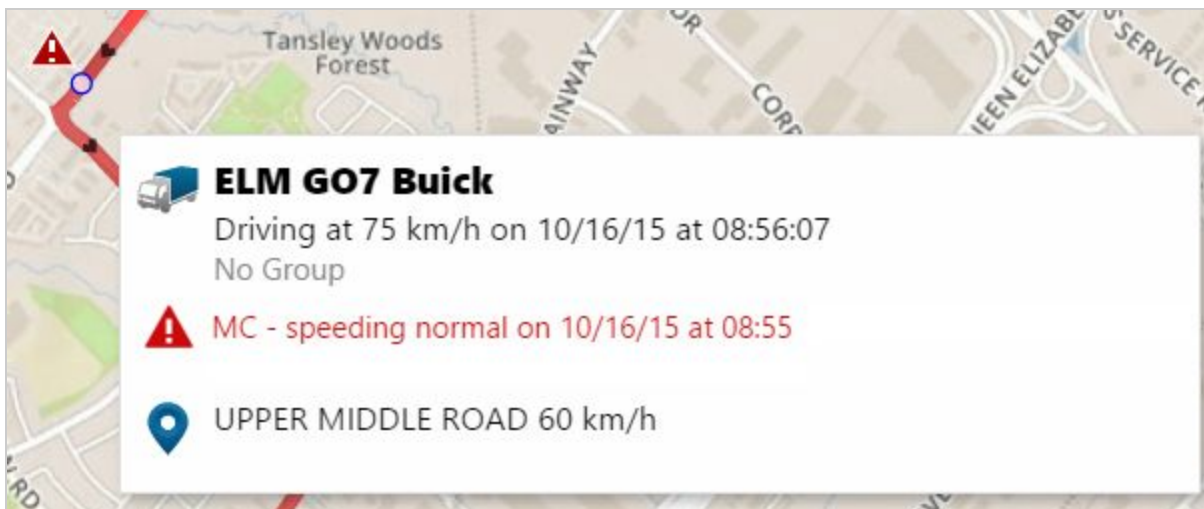
The trail line of the vehicle is color-coded with the exception type which occurred. When multiple exceptions occur, the color will alternate in a banding pattern. In the case when the exception line is too short to be visible, a warning triangle is used in its place:

The direction of travel along the trip is denoted with arrows. A star with a number indicates a customer stop (if a zone was created at that location) and a square with a number indicates a stop that occurred outside of a known zone.

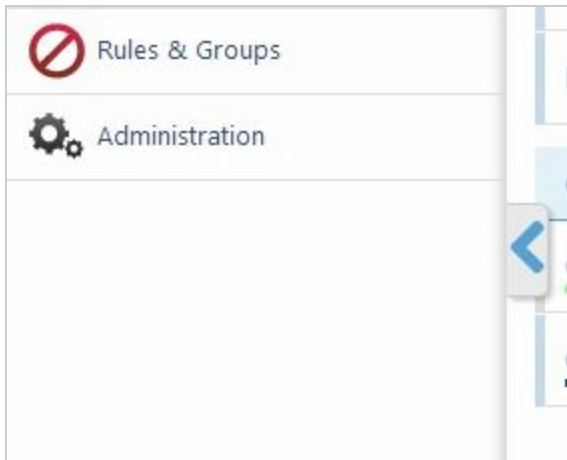


By moving your mouse along the trip, additional information about your selection is displayed including:

- Vehicle name
- Time, date, and address
- Movement status
- Exceptions
- Road speed

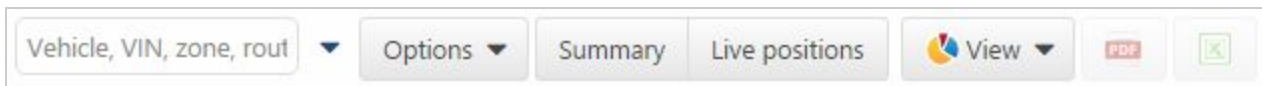


When viewing trips on a map, the main menu will automatically collapse to allow for more room to view the map. To re-open the main menu, select the arrow located on the far-left edge of the view.



5.4 Trip summary

From within the **Trips History** view, selecting the **Summary** button will show you summarized trip information throughout your fleet.



The trip summary view allows you to compare essential driving data for your entire fleet. By default, the vehicle list is sorted based on the distance driven for the specified time period. The pie chart on the right side shows the durations of the stops inside customer, office, home and non-customer zones.

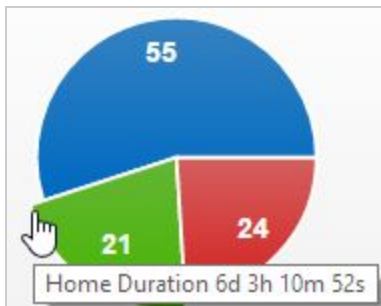
Activity and Trips Summary Report

Total items 179

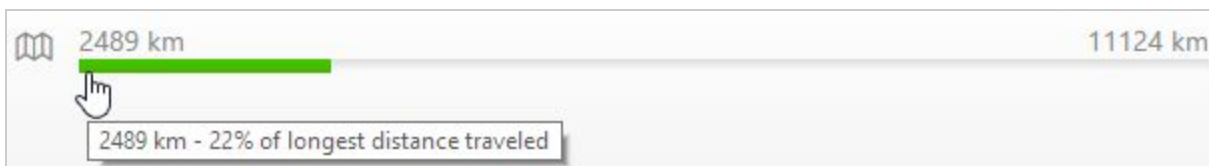
Tuesday, December 01, 2015 - Thursday, December 31, 2015

Vehicle 1	<u>812 km</u> 11124 km <u>18h 59m 10s Driving</u> 30m 54s Idling	
Vehicle 2	<u>195 km</u> 11124 km <u>3h 17m 5s Driving</u> 11m 38s Idling	
Vehicle 3	<u>961 km</u> 11124 km <u>20h 20m 43s Driving</u> 2h 15m 5s Idling	

Note: Hover your mouse over the pie chart to examine where the driver is spending their time.

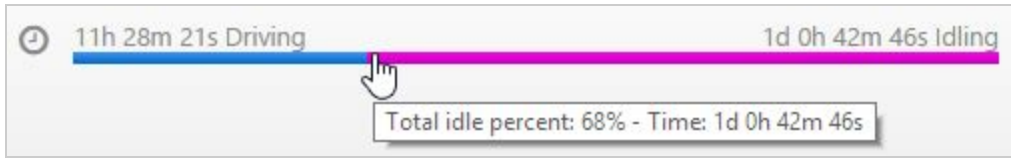


Hover your mouse over the green distance line of each driver to see the percentage of distance compared to the longest distance traveled.



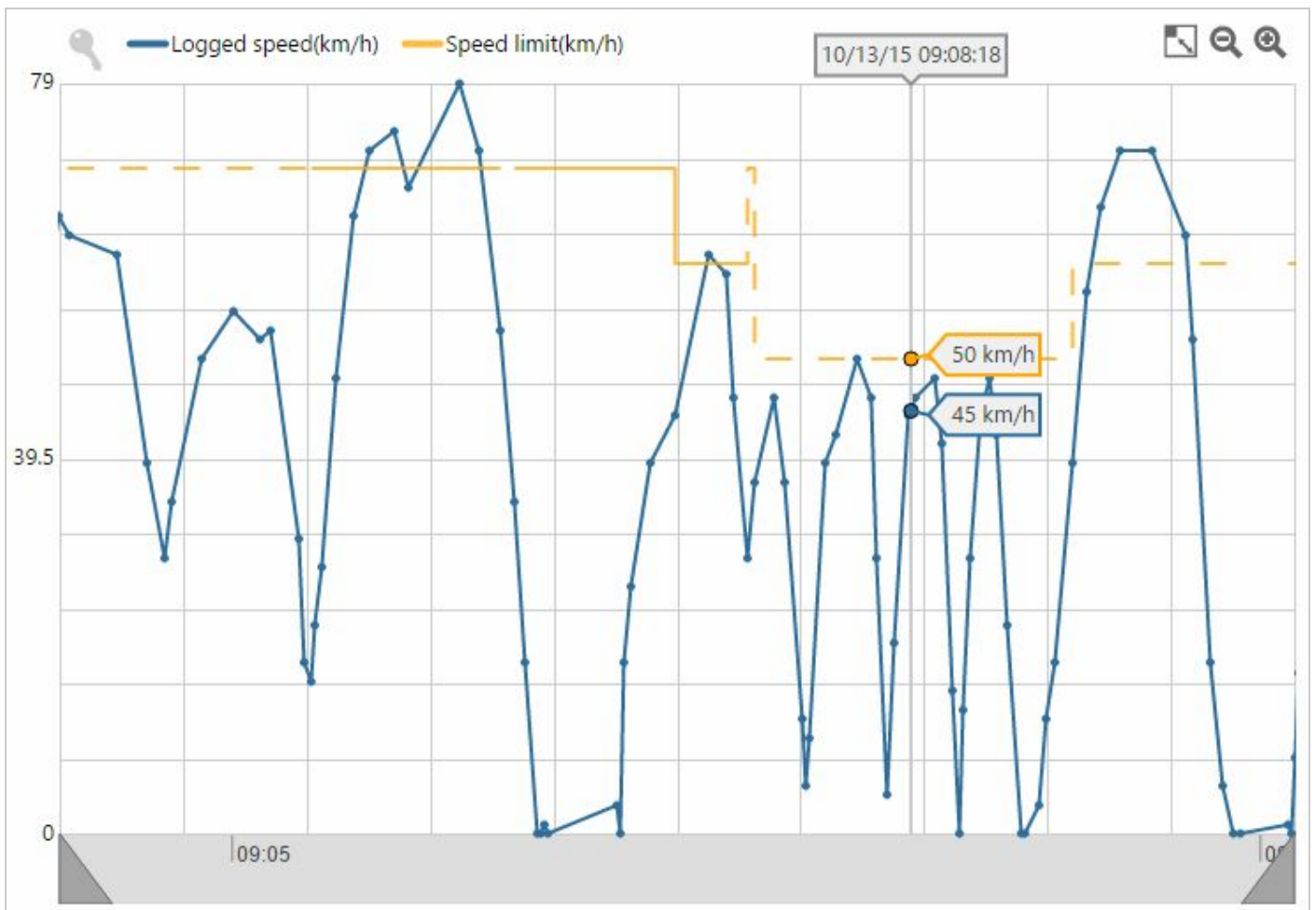
You can examine the idle time compared to the overall drive time by hovering over the

clock icon.



5.5 Speed profile

Navigate to the real-time speed graph by selecting **Activity** > **Speed Profile** from the main menu. The Speed Profile page can also be accessed through the drop down on the Trips History page.



Reading the graph: The blue line represents the speed of the vehicle and the orange line shows the speed limit. A solid orange line means we have a high confidence that the speed limit data is accurate; a dashed line means that it is based on data that may be less accurate; and no line means we do not have any speed limit data for that point in the trip.

5.5.1 Speed limit data providers

This allows street level accurate notifications to be sent when a driver exceeds local speed limits. Posted speed limit data comes from two sources:

- NAVTEQ Maps
- Open Street Maps (OSM)

5.5.2 Road Speed Data Availability

Countries in which we support posted road speed data:

- North America: USA, Canada
- Oceania: Australia
- Asia: Japan
- Europe: England, Isle of Man, Ireland and Northern Ireland, Scotland, Wales, Germany, Switzerland, Austria, Belgium, Denmark, Finland, France, Greece, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden, Slovenia, Norway
- Caribbean: Puerto Rico
- South America: Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Peru, Uruguay

Posted road speeds can change frequently and may contain inaccuracies. You can update the posted road speed of any road by left-clicking on a road from the live map and selecting **Update posted road speed** from the menu that opens.

We share the changes you make to posted road speeds with all customers. That way, everyone benefits from each other's changes. On a monthly basis, we will send the latest posted road speeds to OpenStreetMaps, where they will make them available to everyone else on the Internet.

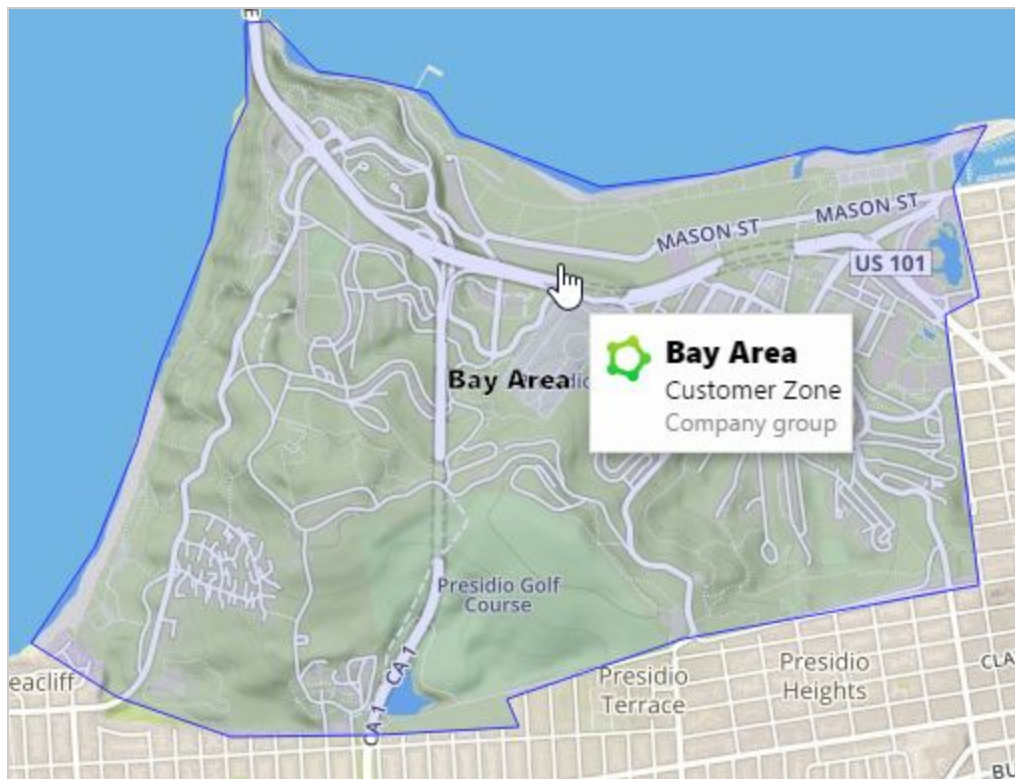
Note: Due to the possible inaccuracies caused by road construction or other hazards, we recommend that posted speed limits be used as part of a larger safety strategy.

For the latest coverage maps from the above data sources see [here](#).

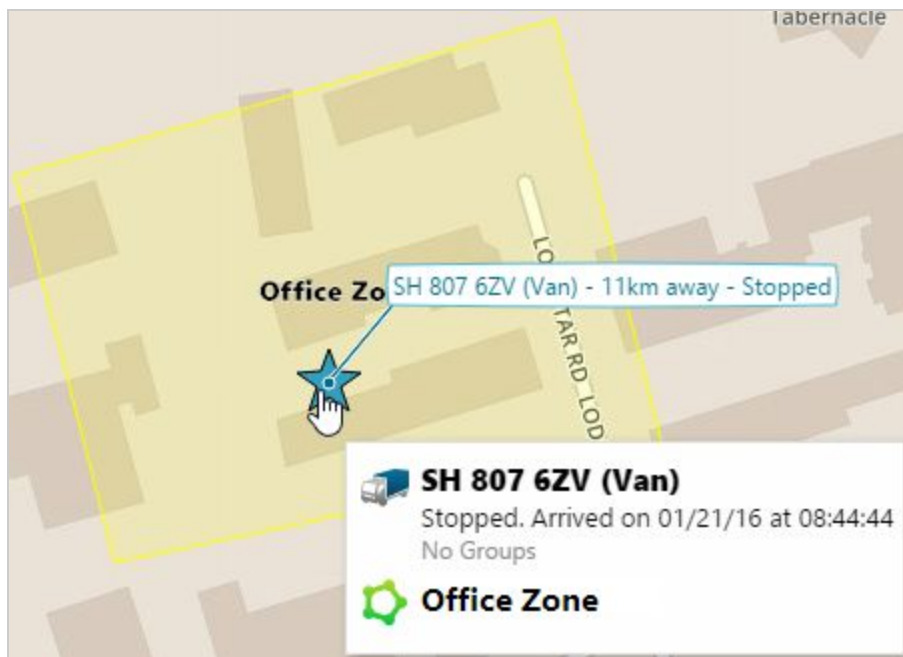
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6 Zones

A zone is a virtual perimeter around a real-world area of interest. You can use zones to denote locations such as offices, customers, workplaces, airports, gas stations, entire states and provinces, or people's homes. When combined with exception reporting, zones become a critical component for analyzing the behavior of your fleet.



In the picture below, a vehicle trip is shown where the driver stopped inside a zone. When you hover your mouse over the stop, the name of the zone is displayed.



6.1 Creating a new zone

To create a zone, select the **Add Zone** button from the **Map** page or the **Add** button from the **Zones** page. You can create an unlimited number of zones and they can be

created individually or by importing a list you prepared in a spreadsheet application. You can also quickly create a default zone by left clicking on the map, and selecting the option **Add square zone here**. You can later customize your newly created zone.

Vehicle, VIN, zone, route or add ▼

Map ▼

Add zone

Trips history

To define the boundary of your new zone, first select a starting point on the map. Continue creating the boundary by selecting points along its perimeter. A line will connect the points, showing the perimeter in the order you add them. To finish, close the zone by re-selecting the starting point once again, then select the **Save** button.



Tip: While the zone is being created, the round markers on the corners of the perimeter lines can be moved. To remove a point, drag the point off the map.

6.2 Customizing a zone

After creating a zone, you will be taken to the **Zone Edit** page. From here you can give the new zone a name. This name will be used in reports and on the map.

Save
Remove
Cancel
Types
Show on map

Zone Edit ?

Name:

Many of the fields for the new zone will be automatically set to an initial value. However, you may want to specify your own customizations such as which group the zone should belong to. Additionally, you can provide any other details about the zone in the comments field, disable the zone from being displayed on the map, and change the color used to display the zone.

Publish to groups:

▼

Comment:

Created by John on December 30th, 2015

Another important aspect of zones is their type. The zones that you create can belong to different classes such as Customers, Offices or Homes. By using zone types, you can create very specific reports. For example, if you create zones at customers, you can report and filter by the customers' zone type. This allows you to easily see when drivers arrived and departed from your customers' location.

Visible on map: Yes No

Types:

Note: You can manage your zone types by selecting **Types** from the top menu.

By using zones in combination with real-time location tracking, reporting becomes a powerful tool for productivity. Exceptions generated by drivers will include information about which zones they were inside (or outside), or even near. This enables a number of possible scenarios such as:

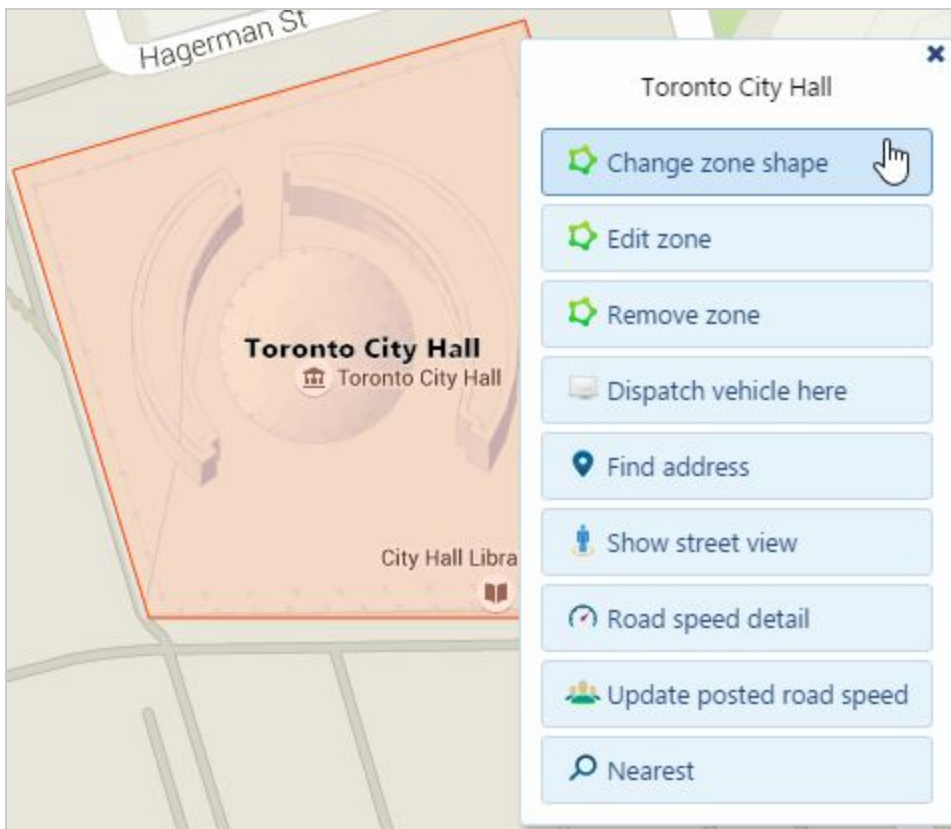
- Have an email sent out when drivers arrive at customer location

- Sound an in-vehicle alert to a driver who has left work early
- Notify your shipping and receiving department that a truck is about to arrive

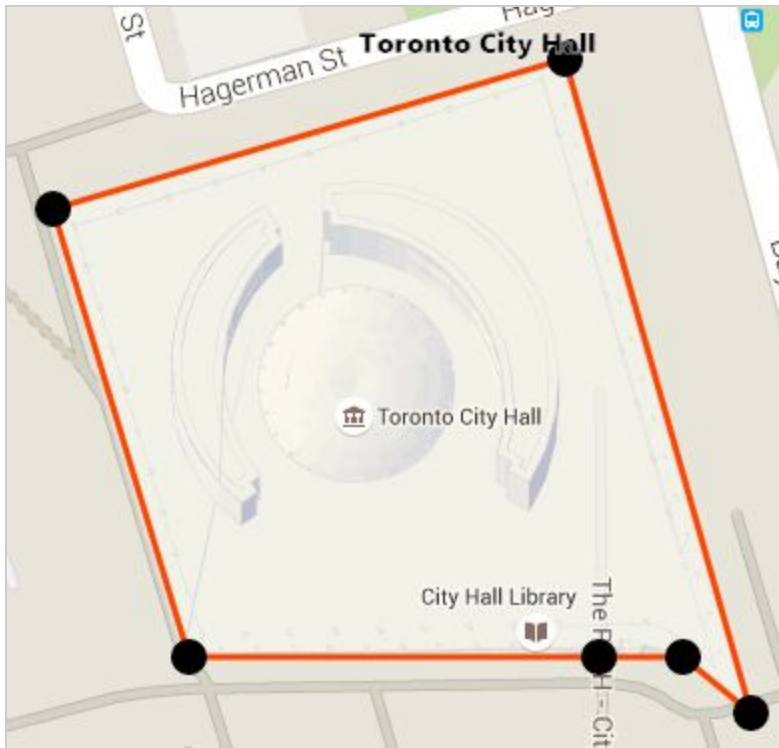
The application recognizes stops made within zones, such as customer areas, and can also indicate the amount of time spent at these locations.

6.3 Modifying an existing zone

To change the shape of a zone, find the zone on the map or search for it in the zones list. Clicking on a zone from the map will open a menu, as in the image below.



Select **Change zone shape** to modify the boundary of the zone. To add a new point to the boundary, click anywhere along the zone boundary. Remove an existing point by dragging it off the map. When finished, select **Save changes** to go to the zone edit screen. Click the **Save** button to finalize your changes.

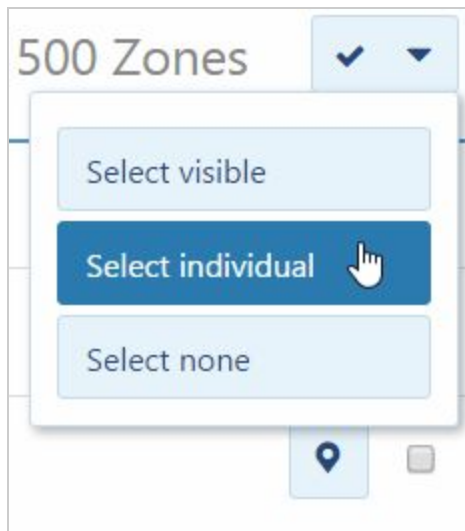


Note: Changing zone properties will affect future data. You can reprocess data to affect data from the past.

6.4 Removing zones

Zones can be removed from the database by selecting a zone and then selecting **Remove**. Once the zone is removed, it will no longer appear on the map. Any reports that previously displayed the zone name will instead show the zone address, if available.

Making changes to or removing multiple zones at a time is made easy by using the checkbox in the top-right corner to select multiple zones.



Once your zones are selected, select **Remove selected zones** or **Edit selected zones** from the top menu to affect all the selected zones.



Note: The zone list displays 500 zones at a time; use **Select Visible** to select the entire page at once.

6.5 Importing zones

You can use a spreadsheet application to prepare a list of zones to be imported to your account. This saves time when you want to create a large number of zones.

When addresses for your zones are available, use the following format to create a spreadsheet in Excel:

	A	B	C	D	E	F
1*	Name	Address	Reference	Comments	Is zone circular?	Diameter
2	New Zone Without Coordinates	Canada, Oakville	This is a reference for this zone	Comments	No	250

If you are creating zones in a remote area where street addresses are unavailable, you can use the following format which utilizes geographical coordinates instead:

	A	B	C	D	E	F	G
1*	Name	Latitude	Longitude	Reference	Comments	Is the zone circular?	Diameter

2	New Zone Without Coordinates	43.434438	-79.709544	This is a reference for this zone	Comments	Yes	250
---	------------------------------	-----------	------------	-----------------------------------	----------	-----	-----

You will notice that:

1. In both examples, the reference column is an incremental number starting from 1 and is used to verify that all zones have been successfully created.
2. The diameter is based on the user's measurement system, i.e.: 250 metres for metric or 250 yards for US.

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7 Routing

Effectively dispatching your drivers is easy when you use the application to do your route optimization. You can reduce fuel consumption, mileage, CO2 emissions and increase your organization's operational efficiency. As a fleet manager, you know how important it is to make accurate and fast deliveries while maintaining high customer satisfaction levels.

7.1 Create a route

Routes are created by connecting a sequence of zones together to form a path. The route can optionally start and end at the same location and you can add the zones in any order as the route can be optimized automatically later.

Navigate to **Zones & Messages** from the main menu. Select sub-menus **Routes...** and then **Routes** to display your existing routes. Or click this direct [link](#).

Select **Add Route** from the top menu to create a new route.

Assign a departure point for the route by selecting a zone on the map and clicking **Add Waypoint**. Continue to select additional zones that the driver must visit along their route. After all zones have been added, select **Save route** from the top menu.

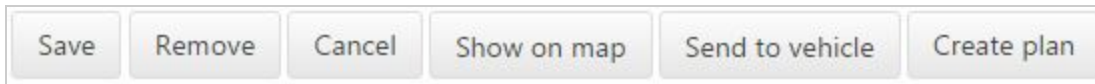
Zones and waypoints are treated the same way by routes.

7.2 Compare the route taken to the route planned

You can create a route plan to examine how a driven route compares to a defined route. The route plan consists of your route, the timeframe for completion and a specific driver.

The route plan comparison is a powerful way to highlight where and when a driver unexpectedly spent time or has made unplanned stops.

Navigate to an existing route (**Zones & Messages > Routes... > Routes**), then select **Edit route**. Click **Save** (even if you did not modify the route itself, you need to click save to get the options to create a route plan). Select **Create plan** from the top menu to create a route plan.



Assign a specific vehicle to the route plan by selecting one from the drop-down list.

Vehicle:

The Zones organizer lists each zone’s part in the zone plan. Estimated times based on the distance between each zone will be given. Based on your business requirements, you can adjust the times between each zone to account for deliveries, customer visits or other actions the driver will perform. When finished, select **Save** from the top menu.

In the example below, we expect the driver to leave Bronte at 9 AM; drive 9.57 (km or miles depending on your local preferences); and arrive at Ambleside 11 minutes later, at 9:11. After waiting for 5 minutes, the driver should leave Ambleside, en route for his/her next destination.

1	1243 Bronte Rd, Oakville, Ontario, L6M 4G4, Canada	<input type="text" value="09:00"/>	<input checked="" type="checkbox"/> Vehicle parked here at route start.
2	420 Ambleside Dr, Oakville, Ontario, L6H 6P4, Canada	<input type="text" value="09:11"/>	<input type="text" value="9.57"/> <input type="text" value="00:11"/> <input type="text" value="00:05"/>

Note: Zones and waypoints are used to monitor actual stops, and will not monitor a vehicle passing through them that does not stop (such as snowplows).

7.2.1 Plan vs. actual route report

In addition to the map-based report, you can also run a downloadable text-based report of your route plans.

7.3 Importing routes from external systems

This process requires the use of the Software Development Kit (SDK). There is an

example file in the SDK to assist you in the process of creating a route import utility. The example file facilitates the rudimentary adding of route plans, whereby the details of the route name, stop locations, the estimated time to drive to each location and the estimated time to be spent at each stop are added via a simple user interface then imported into your database.

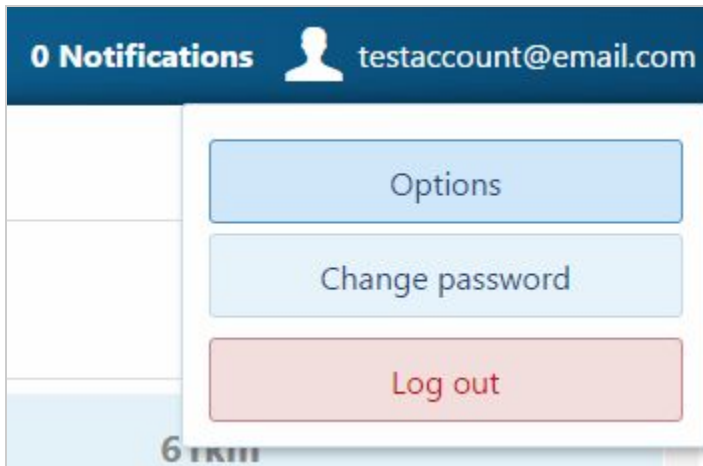
Note: Contact your reseller for more information on the SDK samples and for assistance with this process.

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8 Users

The telematics application is used by people all around the world. You can customize your account to specify your local date and time format, measurement units, local time zone and language.

To change your personal preferences, click on your account name in the top-right corner of the screen and select **Options** from the drop-down menu.



8.1 Regional settings

The most common preferences are located at the top of the Options page. You can change the unit of measurement used for speed and distance (kilometers or miles), the date format, the time zone and the language.

The currently supported languages are English, French, German, Japanese, Spanish, and Vietnamese.

REGIONAL SETTINGS

Distance Measurement system	Metric
Fuel Economy Measurement	L/100 km
Date will have the format: 17 Dec 2015	<ul style="list-style-type: none"> dd/MM/yy dd/MM/y dd/MMM/y d/MMM/y d.M.yy dd.MM.yy yy-MM-dd y-MM-dd MM-dd-yy MM-dd-y
Time will have the format: 13:54:51	HH:mm:ss
Time zone: 17 Dec 2015 13:54:51	America/New_York
Week starts on:	Sunday
Language:	English

Note: We are always in the process of adding new languages to our product and we welcome your suggestion as to which language to add next.

8.2 Map settings

The application gives you the ability to choose which map provider to use. We offer OpenStreetmaps by default, as well as Google Maps. In some areas one map provider's imagery may be more recent than another. For that reason, you can change your default view using the options below. Refer to the previous section on Views to learn about creating default map views to automatically center on an area when you open the live map.

MAP SETTINGS

Default map type:

Default map view:

Default zone display:

View organizer: *The view at the top of the list is the default for new maps*

- North America
- World
- Atlanta

Tip: You can drag and drop the views (blue) to order them as you want. The view at the top will be used as the initial view.

8.3 UI Settings

You can change which page is initially shown when you log in to the application by selecting from the **Default page at start-up** list, as shown below. Newly created users will be shown the Getting Started page, and after becoming accustomed to using the application, selecting a different page may be more beneficial to more advanced users.

UI SETTINGS

Default page at start-up:

News notifications: On Off

Feature preview: On Off

Feature Preview

You can toggle the Feature Preview setting to enable some of the new features that are in progress. These features may change, break or disappear at any time, and we do not recommend using these features in a production settings. If you decide to test a

previewed feature, feel free to send us feedback via our forums or resellers.

8.4 Hours of Service rule set

The application supports most of the current hours of service regulations. Depending on where your business operates, select the rule set which applies to your drivers below.

HOURS OF SERVICE RULE SET

Rule Set Followed by User USA Property 60-hour/7-day ▼

8.4.1 Supported Rulesets

- No HOS ruleset
- USA Property 60-hour/7-day
- USA Property 60-hour/7-day (16-hour exemption)
- USA Property 70-hour/8-day
- USA Property 70-hour/8-day (16-hour exemption)
- USA Property Short-haul
- USA Passenger 60-hour/7-day
- USA Passenger 70-hour/8-day
- USA Passenger Short-haul
- California Property Intrastate
- California Passenger Intrastate
- Canada 7-day Cycle 1 (Feature Preview Beta)
- Canada 7-day Cycle 2 (Feature Preview Beta)

8.4.2 Garmin Rulesets

Please note that Garmin only supports the following rule sets:

- USA Property 60-hour/7-day
- USA Property 60-hour/7-day (16-hour exemption)
- USA Property 70-hour/8-day
- USA Property 70-hour/8-day (16-hour exemption)

8.5 Ruleset Explanations

8.5.1 No HOS ruleset

Driver can still create records of duty status, but they will not be evaluated for HOS availability or violations.

8.5.2 USA Property

- Driver can drive for 11 hours after 10 hours off duty
- No driving after 14 hours of consecutive on-duty time
- 30 minute breaks required after 8 consecutive hours into work day
- 34 hour reset available. Does not require 1-5am breaks, or 168-hour period between resets (after H.R.83 bill)
- 10 hours sleeper berth can be split into two periods (8 and 2 hours)
- 60-hour/7-day: gives 60 hours on-duty time available in a 7 consecutive day cycle
- 70-hour/8-day: gives 70 hours on-duty time available in a 8 consecutive day cycle, if CMV operates every day of the week
- 16-hour exemption is an additional 2 hours applied to 14 hour on-duty time limit. Can only be used after 6 consecutive days since last exemption, or a 34 hour reset

8.5.3 USA Property Short-haul

- Should only apply to drivers operating within a 100 air-mile radius of normal work location
- Driver can drive for 11 hours after 10 hours off duty
- No driving after 12 hours of consecutive on-duty time

8.5.4 USA Passenger

- Driver can drive for 10 hours after 8 hours off duty
- No driving after 15 hours of (non-consecutive) on-duty time
- 60-hour/7-day: gives 60 hours on-duty time available in a 7 consecutive day cycle
- 70-hour/8-day: gives 70 hours on-duty time available in a 8 consecutive day cycle, if CMV operates every day of the week
- Short-haul: Same as property-carrying short haul, but 10 hours maximum driving time following 8 hours off duty

8.6 Managing users

So far, all the options explained have been applied to the currently signed-in user profile. As an administrator of an account, you have the ability to manage other user profiles by making changes on their behalf. Navigate to **Administration** from the main menu then select **Users** from the sub-menu.

Select a user to manage from the list. The user's preferences will be shown, allowing you to make changes.

User Edit ?

User
Driver
Options

USER INFORMATION

User (Email):

First name:

Last name:

Password:

Force password change on next login: Yes No

Security clearance:

Data access:

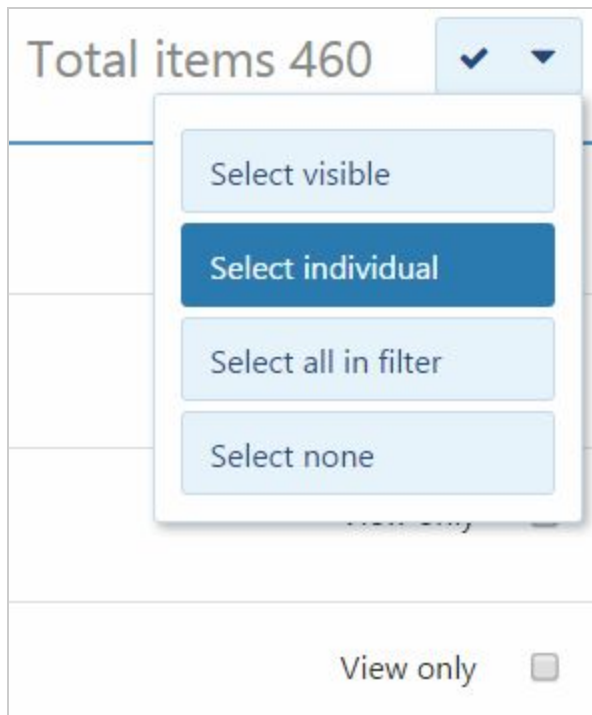
▼

This screen is composed of three tabs:

- User (User/Employee settings and assigned groups)
- Driver (Driver ID settings)
- Options (User preferences)

8.7 Modifying multiple users

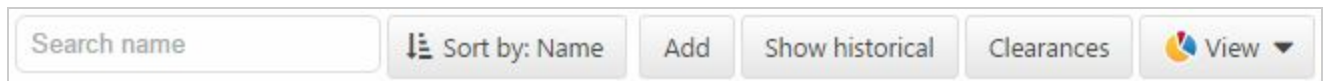
If you want to make the same changes to a number of user accounts, you can use the drop down list in the top right corner to select multiple users.



8.8 Security clearances

You can configure user-level security which ensures certain users have access to limited groups or only specific application features. This process can help to simplify the workflow for a new user by hiding unused advanced features.

To add or change security clearances select **Administration** from the main menu, then select **Users** from the sub-menu. From the top menu, select **Clearances**.



Users can be grouped into different access levels that you define and individual permissions can be applied to groups of users.

The application defines the following access levels and in most cases provides a suitable set of access levels:

- Administrator (Full access)
- Supervisor (Removes ability to change users, databases, engine data, server status and global system options)
- Default User (Can create zones and groups and is able to view data for drivers and vehicles which belong to their own group)
- View Only (Allows viewing all data within their group but cannot make changes)
- Nothing (Allows access to help and should be reserved for training purposes)

8.9 Marketplace applications

By default, users will see all available marketplace applications. These include both free and paid applications, as well as applications developed by third-party vendors. Administrators can customize the types of applications visible to the user as follows:

Show/hide third-party applications	<ol style="list-style-type: none"> 1. Select Administration from the main menu 2. Select System... > System Settings 3. Go to the Marketplace tab 4. Toggle Display third-party apps
Show/hide paid applications	<ol style="list-style-type: none"> 1. Select Administration from the main menu 2. Select Users 3. Click the Clearances button from the top menu 4. Select a user 5. Check/Uncheck View paid items in the Marketplace
Show/hide Marketplace entirely	<ol style="list-style-type: none"> 1. Select Administration from the main menu 2. Select Users 3. Click the Clearances button from the top menu 4. Select a user 5. Check/Uncheck View advanced help items

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9 Groups

You can organize your vehicles, exceptions, zones and users into groups to match the layout of your own organization. For instance, if your organization has East and West divisions, then you can easily separate your account in this way. This allows important information for each division to be presented only to those responsible for managing them.

9.1 Managing groups

Navigate to **Rules & Groups** from the main menu then select **Groups** from the sub-menu. Groups are managed using a graphical interface that shows the hierarchical organization of your organization including the base set of groups provided by the application.



- Locations (Used to separate assets into the areas they service. For example, East and West)
- Reports (Used to denote which users receive the available emailed reports)
- Vocation (Used to organize assets for reporting sales, service, delivery, etc)

Groups can be placed inside other groups. This allows your account to be set up to match your organization’s hierarchy.



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10 Messaging

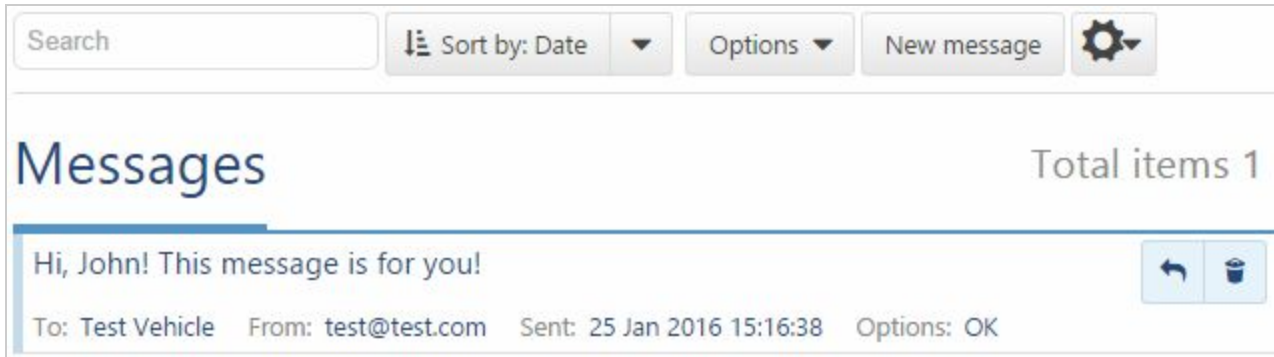
The Telematics Device works with Garmin in-vehicle navigation devices to allow seamless two-way text message communication from the web with the driver. Messages sent to drivers appear as alerts and can be answered using unobtrusive, single tap responses for acceptance and acknowledgement of new jobs and tasks.

Note: A Garmin device can be added to a version 6 or version 4v3 Device. Not every Garmin model works with of all the features the Telematics Device offers. Contact your authorized reseller to purchase the necessary hardware.

10.1 Messaging hub

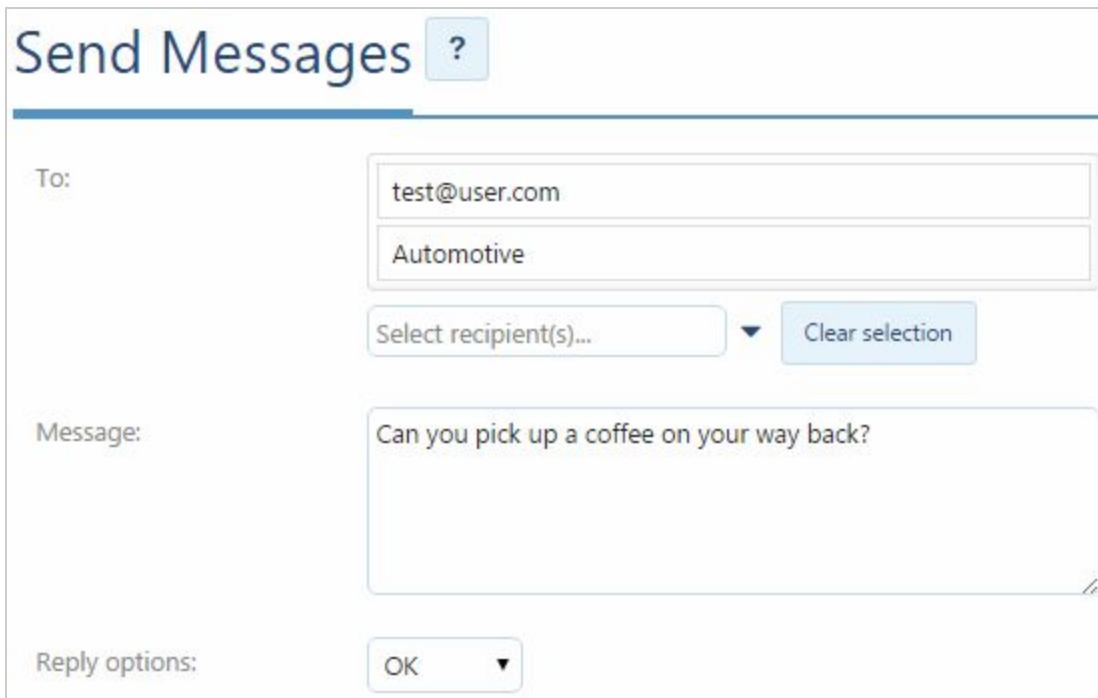
You can access messaging by selecting **Zones & Messages** from the main menu. From there, select **Messages**. This screen allows you to review and report on historical

messages sent and received through the application.

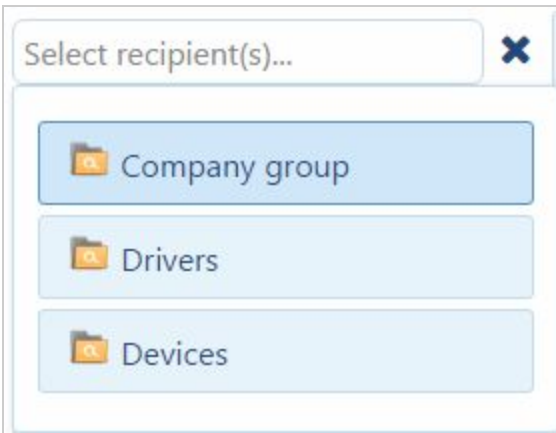


10.2 Sending a text message

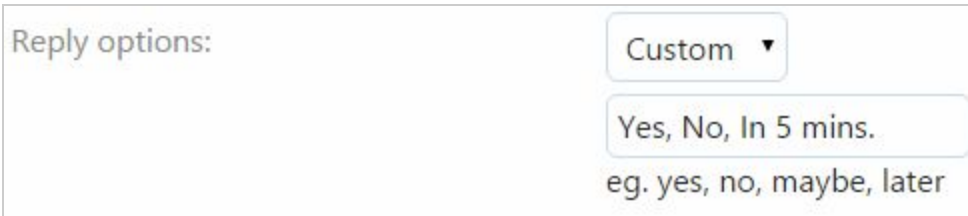
From the messaging hub, select **New message** from the top menu. A message can be sent to a single driver or a group.



1. Specify recipients: Select one or multiple recipients by either typing their name in the text box or by navigating your user list after selecting the blue arrow to the right.



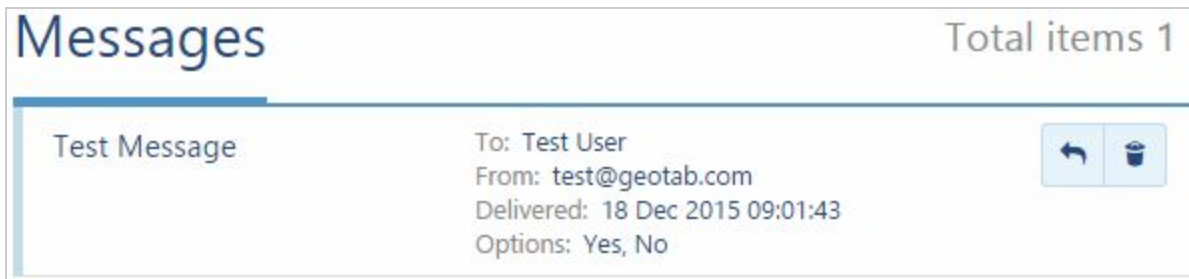
2. Compose message: Compose the text message to be sent. You can use up to 256 characters.
3. Reply options: Select a canned response or input a custom response by separating each possible response by a comma. For example: Accept, Decline, Later.



10.3 Reviewing sent messages

After a text message has been sent, a record displaying the user that sent the message and the date and time at which the message was sent can be viewed on the page **Administration > System... > Audit Log** with the label **Send message**.

Detailed information about sent messages including the date and time of delivery and the driver's response if one has been received is available from the messaging hub.



10.4 Status groups

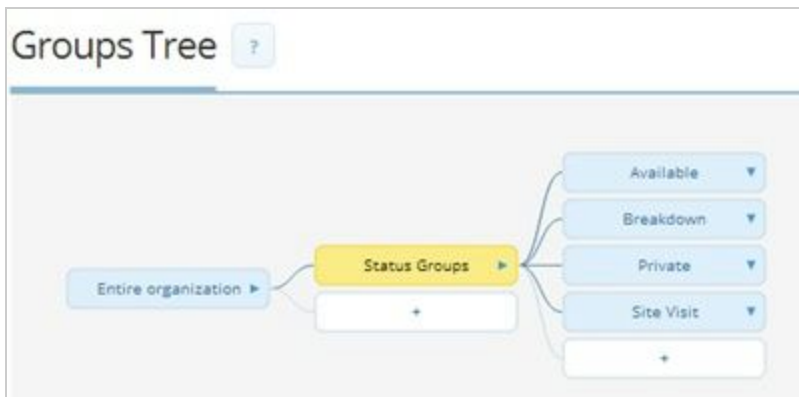
Drivers with Garmin-equipped vehicles can notify their team of changes to their working status using common statuses. For example, when a driver has completed a task and requires new work, they can set their status to available. This status update can then be

used by dispatch to select the most relevant driver for a task based on not only location but availability.

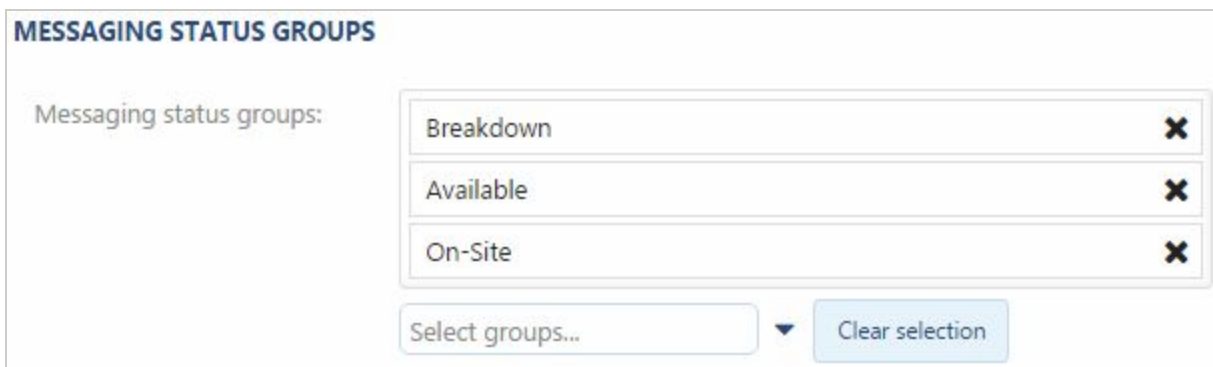
Other common statuses are:

- Available, Busy, Do not disturb
- Assistance Needed
- Emergency
- On-call

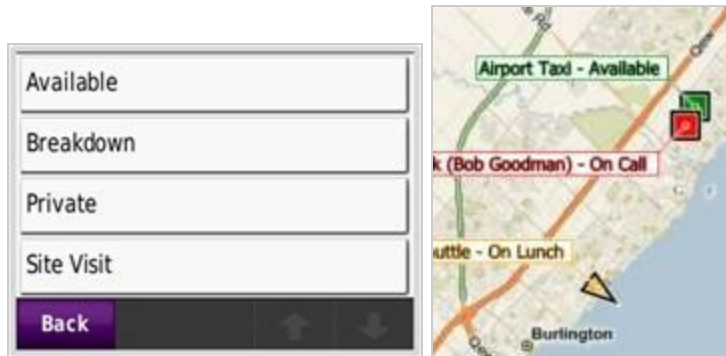
To create the set of statuses available to a driver through their Garmin, navigate to the vehicle properties then select the **Group** tab.



Each vehicle can have up to four available statuses for the driver to select from.



Once the statuses are saved, the driver’s in-vehicle Garmin will be updated. They can set their current status by selecting Quick Message. When viewing the map, driver status will be displayed in the information popup when hovering over their current location.



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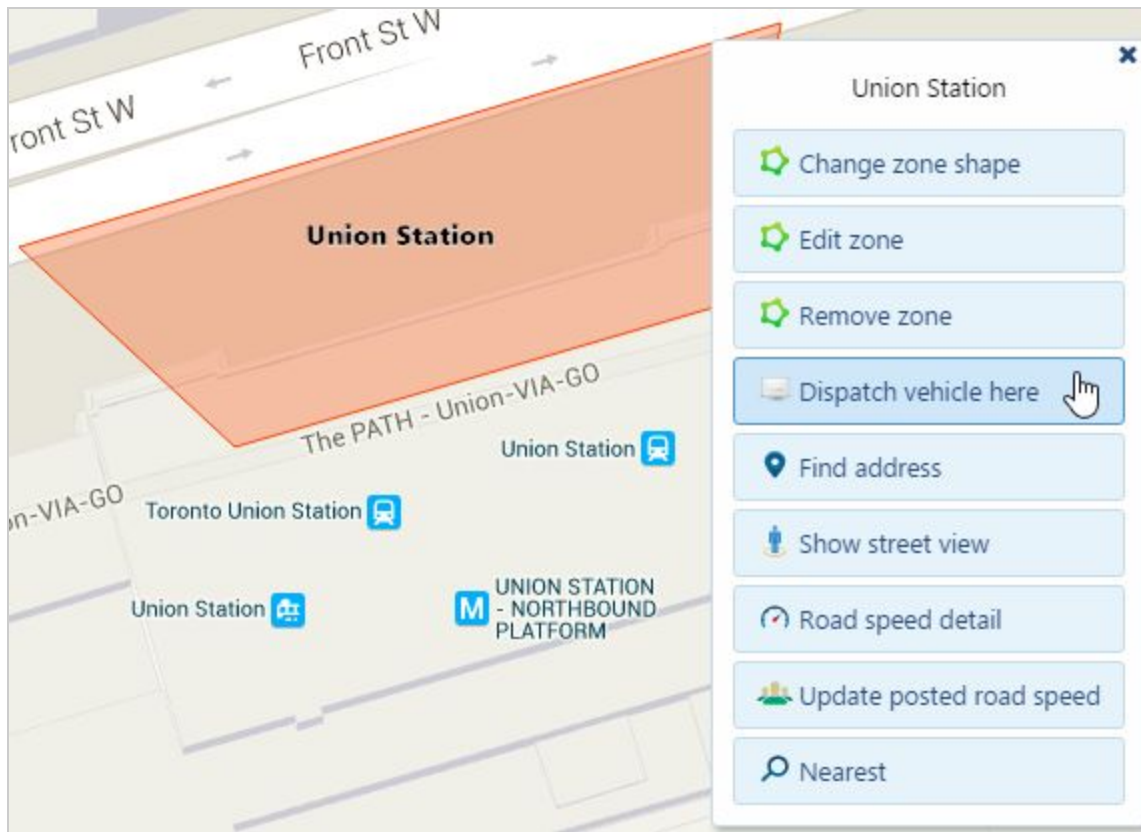
11 Dispatch

The application offers an intuitive way to dispatch members of your mobile team to and from job sites in real time. You can easily dispatch new jobs, pickup and drop off locations, zones or entire routes to your Garmin equipped vehicles.

Note: A Garmin device can be added to a version 6 or version 4v3 Device. Not every Garmin model works with all of the features the Telematics Device offers. Contact your authorized reseller to purchase the necessary hardware.

11.1 Dispatching vehicles to zones

To send a zone you've created to a vehicle, find that zone either by using the map or by searching for it. Once the zone is displayed, simply select it. With the zone options menu now displayed, select **Dispatch vehicle here**.



When creating a dispatch request, you can select one or more vehicles to receive the request. Those drivers can optionally receive text messages you specify which include additional instructions about the job.

Send Address ?

To:




Message:

11.2 Dispatching routes to vehicles

You can send entire routes to vehicles to dispatch a sequence of destinations the driver should reach. To send a route to a vehicle, select **Zones & Messages** from the main menu. Select **Routes...** from the sub-menu, and then select the **Routes** button. Find the desired route and select it.

Routes

148 Routes

Test Route 1	
Test Route 2	
Test Route 3	

Send the route to the vehicle by selecting **Send to vehicle** from the top menu.

Save
Remove
Cancel
Show on map
Send to vehicle
Create plan

Route Edit ?

Description:

Comment:

To get directions, try running the [Default Route Directions](#) report.

Zones organizer:

1

Geotab

2

Lunch Zone

Optimize (shortest distance): Optimize

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12 Exceptions

Understanding when and where issues arise within the fleet is made simple with the use of exception rules.

Exception rules are conditions that outline the ideal behavior of a fleet. When a vehicle event breaks a rule, an exception is recorded within the system. Exceptions can be used to trigger notifications to be sent out to specified users.

In this way, an exception notification can be sent out to the rule-breaker, their manager, and other relevant parties. Fleet managers can then review their exceptions history through reports to understand the trending behaviors of their fleet.

The application offers a robust suite of built-in exceptions separated into the categories of fleet, safety, and productivity. In addition to these, you can create an custom rules

that combine various different conditions to suit your needs.

12.1 Managing Exceptions

Exception rules are managed by selecting **Rules & Groups** > **Rules** from the main menu.

You can make direct changes to built-in rules through the interface — adjusting values like speed and g-force where applicable. The question mark button opens a detailed explanation of each rule. The envelope button opens a list of notification recipients for the rule, allowing you to manage who is notified when an exception rule is broken.



If a built-in rule doesn't fit your requirements, use the pen button to begin creating a customized copy of the selected rule. Once a custom rule is saved, it can be found in the custom rules list below the built-in rules.

Note: Custom rules cannot be edited directly through the **Rules** page. Click on a custom rule to go to the **Exception Rule Edit** page to make your changes.

12.1.1 Built-In Exception Rule Types

Safety Exceptions

The application enables fleet-wide safety and driver improvement through live notifications of in-vehicle behaviors. All exceptions can be configured to interactively alert the responsible driver at the time of exception by using an audible alarm built into the Telematics Device. This feedback allows early detection and response to driver activity, which greatly increases the road safety of your drivers and others on the road with them.

Listed [here](#) are all of the built-in safety-related exceptions that the application offers.

Productivity Exceptions

We are consistently raising the bar when it comes to driver productivity tracking. You can be notified of exceptions such as late arrivals, early departures, idling, unauthorized home or customer stops, excessive office time, long lunches, and even long stops during work hours.

Listed [here](#) are all the built-in productivity-related exceptions that the application offers.

Fleet Exceptions

Thousands of vehicles equipped with our technology have realized significant cost-saving

benefits. We offer the most extensive metrics available to help you reduce fuel consumption. We help you stay proactive in keeping your fuel costs down by managing driver behaviors such as excessive speeding, idling and detecting engine issues before they become costly problems.

Listed [here](#) are all the built-in fleet-related exceptions that the application offers.

System Exceptions

A system notice rule tracks critical errors, originating either in the application software, or from each individual Telematics Device. While the system notice rule is always active, only those administrators who opt in to this rule’s notifications are alerted when exceptions occur. As with any rule, you may select the type of notification you desire.

Your system notice rule may be found [here](#). Click on the envelope icon to customize your notifications.

12.1.2 Adding Exception Rules

Click **Add** at the top of the **Rules** page. Under the **Name** tab, fill in the rule name and any additional customizations you require — including selecting the groups to which the exception rule applies to with the **Publish to groups** drop-down.

Under the **Conditions** tab, use the conditions editor to set the conditions that will trigger the exception rule. Exception rule notifications can be added under the **Notifications** tab.

Click **Save** to add your exception rule.

12.1.3 Removing Exception Rules

Select the rule you wish to remove from the exception rules list. Click the **Remove** button at the top of the **Exception Rule Edit** page. A dialog will prompt you to verify your decision. If you are certain you wish to remove the exception rule, click **Delete**.

Note: Built-in exception rules cannot be removed.

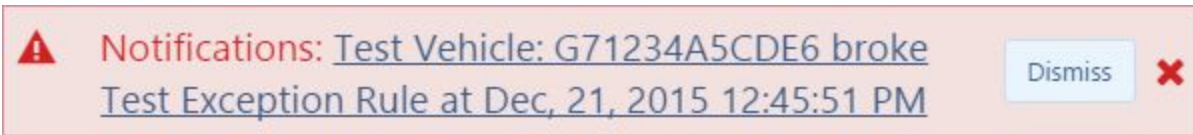
12.2 Exception Rule Notifications

When exception rules are broken, you have the choice to send out automatic notifications to the relevant parties. A notification can be sent out in the following ways:

- An email to one or more recipients:



- An alert that is displayed inside the application to a specified user:



- An audible in-vehicle alert from the Telematics Device
- Additional alerts — such as SMS — as made possible by third-party systems

Note: There may be a minor delay between when data is sent from the vehicle to when the server sends a notification depending on the type of notification and exception being handled.

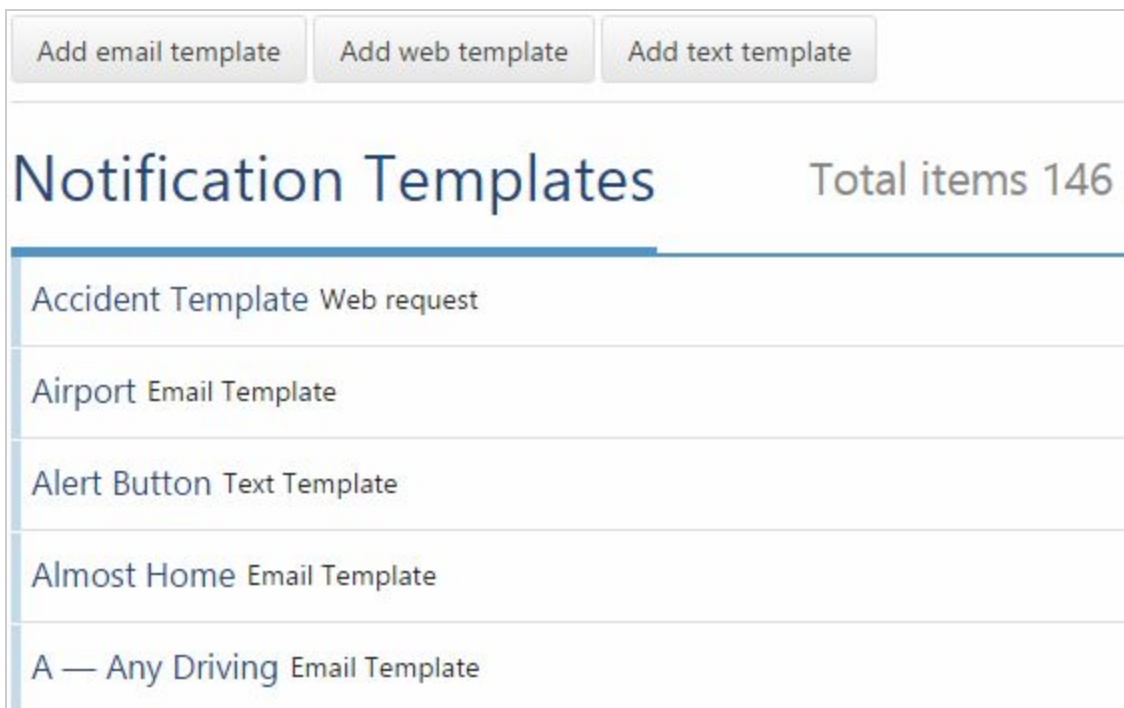
12.2.1 Notification Templates

Notification templates define the information contained within notifications. Notification templates use variable tokens and static text to allow the delivery of customized notifications to recipients. There are three types of notification templates: email templates, web templates, and text templates.

Some use cases of customized notifications are:

- Sending compact notifications to mobile devices to conserve data usage
- Including a contact phone number in emergency situations
- Offering a web link to a map containing directions to a service station when an engine failure is detected

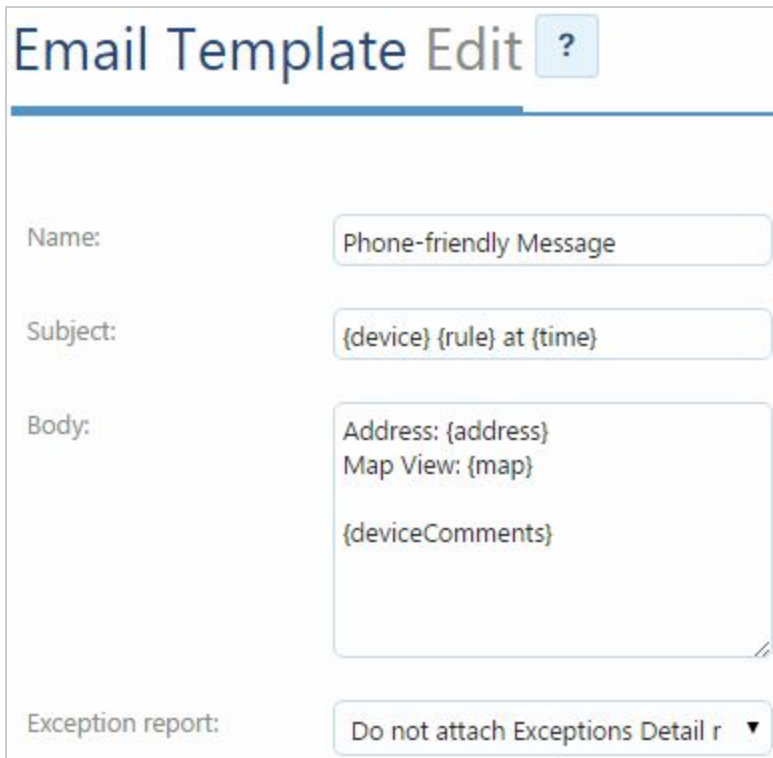
The **Notification Templates** page can be reached by navigating to **Rules & Groups > Rules** and then clicking the **Notification templates** button.



You can access existing templates from the list or you can create new notification templates by using the three buttons at the top of the page.

Email Templates

Email templates are used to customize the emails sent when an exception rule is broken. An exception report can also be attached to the template to provide an in-depth look at the rule infraction. The application provides a generic email template by default.



Email Template Edit ?

Name: Phone-friendly Message

Subject: {device} {rule} at {time}

Body: Address: {address}
Map View: {map}
{deviceComments}

Exception report: Do not attach Exceptions Detail r ▼

Web Templates

Exception rule infraction information can be configured to be sent out as a GET or POST request to a web server.

Text Templates

Text templates are used to customize the information included in a pop-up alert within the application.

Distribution List

A distribution list is a reusable collection of multiple recipients and their corresponding notification type. A distribution list is useful when configuring the same group of users to receive notifications of different exceptions.

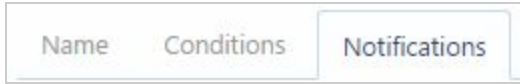
Removing Notification Templates

Because notifications encapsulate notification templates, make sure to delete notification

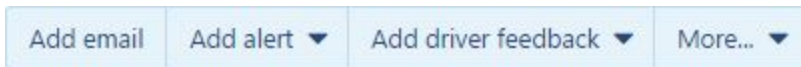
templates with care. Deleting a notification template will delete all notifications using that template — potentially leaving users without notifications.

12.2.2 Adding Notifications

Notification can be added to an exception rule when creating a new rule or when editing an existing rule. Go to the **Notifications** tab of your selected rule.



Before most notifications can be added, you will need to configure a set of corresponding notification templates.



- To add an email notification, select the **Add email** button. In the dialog that follows, choose an email template and a recipient for the notification. Click **Add** to prepare your notification.
- To add a pop-up notification, click the **Add alert** button and select your preferred option from the drop-down. In the dialog that follows, choose a text template and a recipient for the notification. Click **Add** to prepare your notification.
- To add a driver feedback notification, click the **Add driver feedback** button and select your preferred option from the drop-down. Adding driver feedback does not require a direct recipient. Any device that this type of notification is published to will produce driver feedback.
- The **More...** button reveals three additional options: **Web request**, **Assign to group**, and **Distribution list**.
 - A web request notification sends a GET or POST request to a server as defined in a web template. An assign to group notification will set all infracting vehicles as part of a specified group. The distribution list notification will notify all members of a distribution list about the rule infraction.

Click **Save** to add your notifications to the exception rule.

12.2.3 Removing Notifications

Notification can be removed from an exception rule by clicking the small x beside the notification under the **Notifications** tab on the **Rule Edit** page.



Click **Save** to finalize your changes.

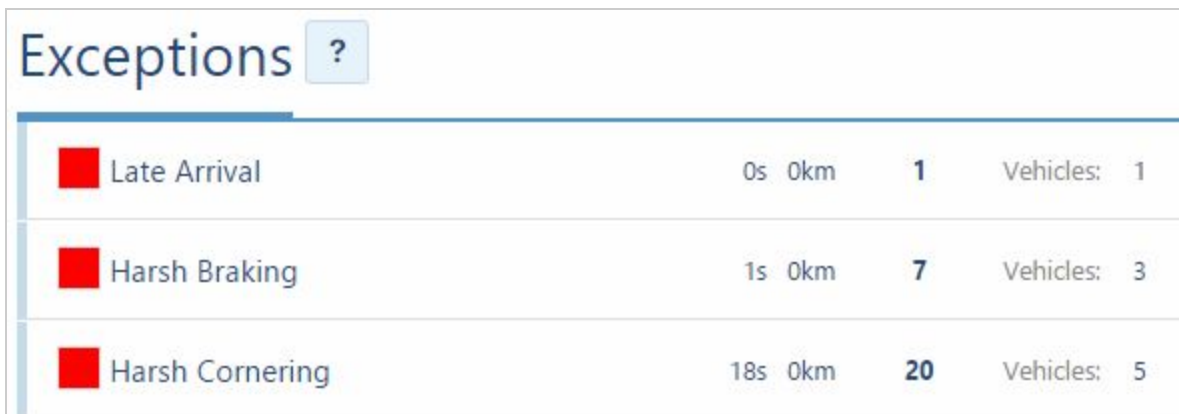
12.2.4 Advanced Notifications




Using the advanced editor, you can further customize the conditions that need to be met for a notification to be sent out. You can combine multiple conditions together to specify exact business cases such as:

- Dangerous driving detected from engine measurements
- Seat belt use when in motion
- Arrivals into and departures from zones outside normal working hours

12.3 Exceptions Report

The **Exceptions** page provides a summary of all exception rules that have been broken within a selected time period. It can be found under the **Rules & Groups** option in the main menu.



Exceptions ?			
 Late Arrival	0s 0km	1	Vehicles: 1
 Harsh Braking	1s 0km	7	Vehicles: 3
 Harsh Cornering	18s 0km	20	Vehicles: 5

The **Options** button opens up a set of parameters used to refine the search criteria for exceptions. The Exceptions report can be run broadly across all vehicles and dates — or on a driver or vehicle basis, including only specific vehicles and exception rules, as well as custom time periods.

By default, the list is sorted in descending order based on the duration of the exception. Alternative sorting options include the distance for which the exception occurred, the amount of times the exception occurred, or the amount of drivers/vehicles that violated the exception rule.

The **View** button opens up a selection of reporting options available for the exceptions data set. A three-page preview of the selected report is shown within the application. The report can be downloaded in PDF and Excel formats.

The interactive list view allows you to open up additional information about exception rules by clicking on its row. If the exception rule for the selected date range has


relatively few infractions, the row will open up additional information, as pictured below.

Exceptions ?			
Test Vehicle			
	Harsh Braking	0s 0km	1
	Harsh Cornering	0s 0km	7
11/03/15:			
14:12:46	0s	0km 37-57 Watline Ave, Mississauga, ON L4Z 1N...	-3.71 m/s ² (-3.53 m/s ²)
11/09/15:			
13:38:05	0s	0km 4300-4302 Dufferin St, North York, ON M3H...	-3.88 m/s ² (-3.53 m/s ²)
11/10/15:			
08:44:02	0s	0km 6865 Airport Rd, Mississauga, ON L4V 1E6, Ca...	3.53 m/s ² (3.53 m/s ²)

If the exception rule has a significant amount of infractions, clicking on the row will take you to a secondary page that sub-divides the infractions by vehicles — or drivers, if selected in the options. Similarly, if the number of infractions per vehicle is high, clicking on a vehicle row will take you to a tertiary page that sub-divides the infractions by date as related to that specific vehicle.

In this manner, you can drill-down your reporting to view specifics as related to particular drivers or vehicles for relevant time periods.

Test Vehicle: Harsh Braking			
Thursday, 10 Dec 2015	0s 0km	2	
Tuesday, 15 Dec 2015	0s 0km	1	
20:46:52	0s	0km	
2557 6th Line, Oakville, ON L6H, Canada			-24.44 m/s ² (-5.65 m/s ²)
Saturday, 05 Dec 2015	0s 0km	2	
Sunday, 13 Dec 2015	0s 0km	4	
Sunday, 06 Dec 2015	0s 0km	4	

Tip: Clicking on the  icon will display the trips history associated with the exception event shown on that row.

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12.4 Named Auxiliaries

Auxiliary rules are exception rules that help you manage sensors and external input devices connected to the Telematics Device. As with exception rules, auxiliary rules are handled in real time.

Note: Auxiliary Rules were formerly known as Auxiliary Groups.

12.4.1 Using named auxiliaries

Create a group for your auxiliaries

Auxiliaries are best managed from their own Group branch under the **Entire Organization** group. To create a new group, go to **Rules & Groups > Groups** and do the following:

1. Add a new group called "Auxiliaries".
2. Add a subgroup under "Auxiliaries" named, for example, "Salt Truck".

Add an auxiliary rule

1. Go to **Rules & Groups > Rules** and click **Add** to begin adding a new rule.
2. Under the **Name** tab, give the rule a name, for example, "Salter".
3. Select the "Salt Truck" group as the group this rule is published to.
4. Click the **Conditions** tab and select the connected auxiliary port from the **More...** menu.
5. Select **True** for the value from the opened Condition Value Selection then click **Add** to associate the new rule with this auxiliary input.
6. Add any additional conditions you might require — such as the ignition being on, a minimum duration, or a vehicle speed — and save the rule.

Note: Your new rule applies to future data. If you would like to apply the auxiliary rule to historical information, you must first reprocess your historical data using the **Reprocess data** button on the **Rules** page.

Apply auxiliary rule to vehicles

1. Navigate to **Vehicles** from the main menu and select one or more vehicles to which you wish to apply the auxiliary rule.
2. Select the **Groups** tab and choose the "Salt Truck" group from the "Groups" drop-down and save.

12.4.2 User Access

Because Auxiliary Rules are applied on a per group basis, a user will need access to that specific auxiliary group to be able to work with it. Note that giving a user access to an auxiliary group in their "Data Scope" may result in them having access to vehicles they are not intended to see. For this reason you can give a user access to the auxiliary group within their reporting scope. This will allow the user to view the exceptions on the map, as well as to create reports from these exceptions.

If the user in question does not have the Entire Organization data scope, then select the auxiliary group you would like the user to be able to make reports of under the **Additionally allow reporting by these groups** label on the **User Edit** page (**Administration** > **Users**) for that user.

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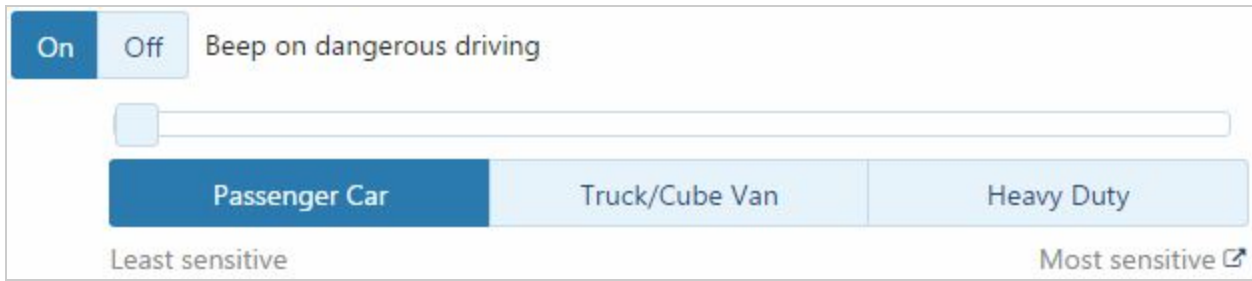
13 Drivers

The Telematics Device and application are designed with next-generation safety technology allowing you to gain incredible insight into your driver's on-road behavior using informative management reports. Risk and safety scores are assigned to individual drivers and are based on various key indicators such as speeding, seat belt usage, harsh braking, sharp corner turns, over acceleration and after-hours vehicle use. You will easily enhance your fleet's safety with real-time risk and safety reporting.

13.1 Accelerometer Driver Feedback Settings (Vehicle Acceleration)

The application offers the ability to set exception rules for excessive driving behaviors such as harsh acceleration, harsh braking, and harsh cornering. These settings can be accessed from the **Vehicle Edit** page under the **Driver Feedback** tab.

Extensive testing has revealed that the different classes of vehicles react to G-forces differently. We therefore offer customized settings to guide the monitoring of aggressive driving in each vehicle class. "Passenger Car" is self-explanatory; "Truck/Cube Van" refers to the typical delivery type box trucks or other step side vans; "Heavy Duty" refers to larger box trucks and tractor trailers.



The table below provides guidelines for the average G-force exertions for various vehicle classes. While the default values found in the application are generally suitable, they are easy to customize.

Event	Passenger Car (G)	Truck/Cube Van (G)	Heavy Duty (G)
Harsh Braking	< -0.61	< -0.54	< -0.47
Hard Acceleration	> 0.43	> 0.34	> 0.29
Harsh Cornering	> 0.47 & < -0.47	> 0.4 & < -0.4	> 0.32 & < -0.32

We recommend starting in the middle of the specific vehicle class and adjusting from there based on fleet objectives and the unique aspects of your fleet. As the slider moves from left to right through all of the vehicle classes, the monitoring becomes more sensitive. When the slider is set to the least sensitive setting for passenger vehicles (furthest left) it is using the most lenient monitoring and only the most aggressive events will trigger driver feedback.

Another factor to be taken into consideration when adjusting the sensitivity is the function of the vehicle: an ambulance with an EMT and a patient in the back would be monitored more closely than a box truck carrying paper towels. Also consider the terrain the vehicle drives on. An urban vehicle on paved streets should be more sensitive than a vehicle that drives off-road to maintain power lines.

We recommend that the fleet manager monitor the readings and adjusts the slider, as per above, based on their real world experience.

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14 NFC Driver ID

We have incorporated the latest in RFID technologies — Near Field Communications (NFC) — into the Telematics Device to deliver driver identification for personnel that switch between vehicles. Driver ID allows fleet managers to have a full view into the activities of their drivers regardless of the vehicle being driven. This allows running reports, rules, and exceptions by driver or vehicle. Driver ID can be combined with a

vehicle Driver ID relay, whereby a Driver ID key fob must physically touch the reader before the relay is engaged.



14.1 Understanding drivers

When using the Telematics Device, a Driver is special type of user account that is configured by your administrator. A driver can be issued a physical driver key (NFC or Driver Identification key) that is then used to identify that specific driver when in a vehicle.

14.2 Driver keys

When a driver enters a vehicle, they use their Driver ID keyfob to associate their user account with that vehicle. When using NFC, this process is performed by tapping the Driver ID key fob on your equipped vehicle’s driver identification reader.

NFC	Driver identification is done by tapping their key (or tag) to the NFC IOX reader. Each key has a visible unique serial number that is associated with a user account.
Driver Identification Key	Legacy driver identification that is inserted into the reader. Driver Identification keys are designed for version 2 and version 4 devices and do not have a visible serial number.

14.3 Using driver identification

When a driver enters a vehicle equipped with a driver identification system, they should first use their driver key to identify themselves before starting the engine. If they do not first identify themselves, an audible alert will remind them that identification is required.

The identified driver will then be associated with that vehicle for the duration of a single

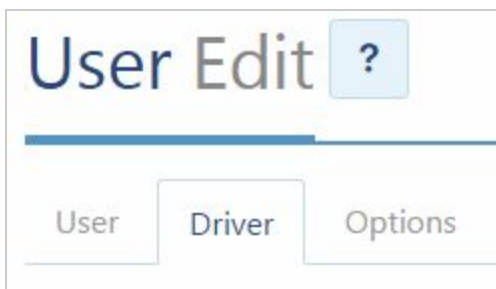
trip or until other drivers identify themselves.

If a driver attempts to use their driver key before it is assigned to their user account, a log will be created in the Audit Log letting you know that an unassigned key has been used to identify a driver in a vehicle.

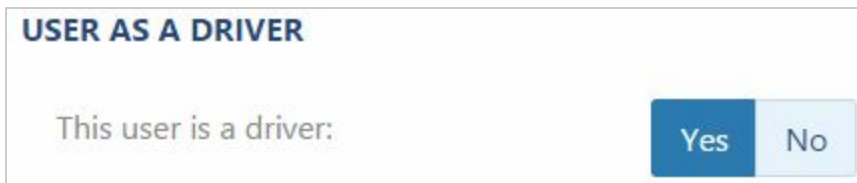
Note: Your account must first have the driver identification feature enabled.

14.4 Configuring drivers

To create a new driver navigate to **Administration** from the main menu, then select **Users** from the sub-menu. Select a user from the list which you would like to denote as a driver, then select the **Driver** tab.



Use the Yes/No toggle to make this user a driver.



From the options shown, select the type of driver keys you are using, either NFC or Driver Identification key (USB). Enter the serial number in the field given, or if using Driver Identification keys you may use the assign key utility.

USER AS A DRIVER

This user is a driver: Yes No

NFC KEY

Serial No:

USB KEY

Serial No:

Enable trip data transfer: On Off

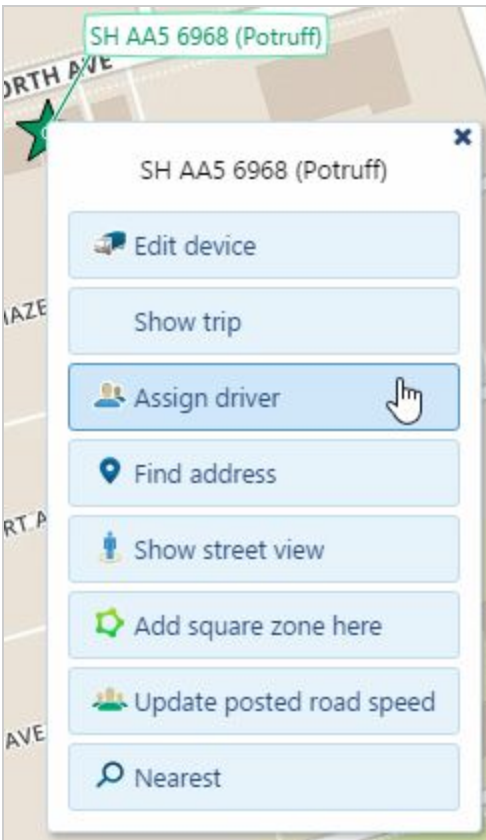
HOME GROUP

Same as data access: Yes No

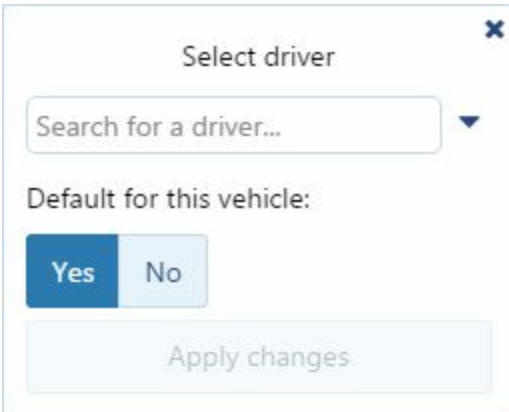
14.4.1 Manually assigning drivers to vehicles

Performing the assignment of drivers to vehicles yourself is useful when you are not using vehicles equipped with driver identification systems. Additionally, if there is a conflict between driver keys and vehicles, you can easily make the manual correction. Follow these steps to assign your drivers to vehicles:

1. Navigate to the **Map** from the main menu.
2. Left-click to select a vehicle.
3. Select **Assign driver** from the drop down list.



4. A small window is displayed, in it select the driver by name from the drop down list.



5. If this driver will be the default driver, use the Yes/No switch to automatically associate them with this vehicle in the future. When finished, select **Apply changes**.


14.4.2 Driver Identification key assignment

The Assign Key wizard can be used with the Driver Identification key reader to prepare a Driver Identification key and automatically assign its serial number to a driver’s user account. Click on the **Assign key** button to the right of the serial number. You will be asked to install ClickOnce and then run the Key Assignment Wizard.


ClickOnce

ClickOnce is no longer supported by Chrome, so follow the instructions and download the executable.

Browser Support Information

 **Google Chrome does not support ClickOnce**

Google has removed support for launching ClickOnce applications using Chrome. You can start this part of the application using Internet Explorer or FireFox. If neither of these options are available to you, download the executable below. It will allow you to login to your database and launch the ClickOnce application.

 Download Executable

This download requires the Windows operating system

Depending on your security settings, Windows may block an executable downloaded from the internet from running. If this occurs, try the following steps:

1. Right click the executable file
2. Click 'Properties'
3. Under the 'General' tab, click 'UnBlock'
4. Click OK
5. Run the application

Pro-Tip:When run, the executable will default to the a generic url. If you would like to specify a different server or add a database as the default you can change the file name accordingly and the application will open to that URL. For example, changing the file name from 'executable.exe' to 'your.url.com databaseName.exe' and running the application will open to the URL 'https://your.url.com/databaseName'.

Run the executable. You will need to run this in administrator mode.

You will get an expected security warning. Click more information, and then click Run anyway. (Or Run.) After you run the executable, a new window will open. Use this new window, not your old one.

Key Assignment Wizard

Now you can just run the Wizard directly.

1. Plug in your reader and wait until it says Connected.
2. Click **Assign key** on the **Driver** tab of the **User Edit** panel.
3. Physically insert your key into your reader.
4. The wizard will start. If your only option is cancel, then remove the key, and reinsert it into the reader.
5. Click **Next** and follow the wizard's instructions.
6. If you return to the **Driver** tab, you will see the serial number of the key now assigned to the driver.

USB KEY

Serial No:

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15 Reports

Understanding your fleet's behavior is made simple with the application. Report on activities such as deliveries per driver, average fuel consumption, drivers who speed and identify those most often late to arrive and early to depart. There are over 30 standard reports to choose from, as well as the ability to create limitless custom reports using Microsoft Excel. Reports can be downloaded to your computer in Adobe PDF or Microsoft Excel to further examine and work with the data.

Schedule your reports to be emailed to you daily, weekly, monthly, or on demand. With proactive management, you can create custom rules for your drivers and receive instant updates through email and more.

15.1 Configuring reports

Navigate to **Administration** on the main menu. Select **Reports...** then **Report views** from the sub-menu. A new screen will display a list of runnable reports. Custom reports appear at the top of the list and built-in reports follow after.

Report views

Built-in Reports

Audit Log	
Advanced Audit Log	
Report types: Advanced report	
Default Audit Log	
Report types: Default report	
Congregation Report	
Advanced Congregation Report	
Report types: Advanced report	

You can assign a report to be part of your dashboard by selecting it from the list and then selecting **Display on my dashboard**.

Display on my dashboard On Off

To customize a report, select it from the list and then select Edit in Excel to make changes.

15.2 Customizing reports

Using Excel to create custom reports allows for limitless options for analyzing your fleet and driver behavior. Using Microsoft Excel, you can include fleet metrics, charts, formulas, and even match your organization’s color scheme for customer facing reports. The following options are available for customizing reports:

- Make changes to templates using Microsoft Excel
- Configure user-level access to individual reports
- Set custom reports as a dashboard
- Control how often a dashboard is automatically refreshed
- Schedule reports to be emailed to users

Report Activity Summary Report

Drag and drop your files here or click and choose them

Report view

Dashboard

Email report

Dashboard graphic options

 On Off

Dashboard graphic

 On Off

Display on my dashboard

 On Off

Dashboard viewers

You have not selected any groups

Select groups... ▼

Only one user will see the graphic

Date range

Previous hour
Today
Yesterday
Previous 24 hours
Previous 7 days
This week

Refresh period

Daily ▼

Next run

04 Nov 2015 16:36

Belonging to

Everything

Select groups... ▼

15.3 Adding Multi-language Support to Reports

Report headings for default reports will be translated into the language currently set by the user. Custom reports can make use of this functionality for any supported language. To add multi-language support for a new report template:

- Create your template, as before.
- Create a new tab with the exact title "Languages". You can hide it later if you choose.
 - The Languages tab has as its first column "English", and subsequent columns are a supported language, such as French, Spanish, German or Japanese. These column titles must be in English.
 - "English" must be the first column
 - The other languages can be in any order.
 - Custom reports do not need to support all languages, a subset is acceptable.
- For each other tab (whether a sheet or a pivot table), prefix each English heading you wish to translate with two asterisks. For example, change "Date" to "**Date".
- Add each of these translated headings to the Languages tab, one per line.

15.4 Dashboard

The application has many different options for what you will initially see when signing in. One of those options is the dashboard: a graphical view of all your reports on one page. The dashboard is meant to highlight critical events and behaviors throughout your entire fleet at a single glance. The reports displayed are up to you and can be customized using Microsoft Excel.

Listed below are the built-in graphics displayed on the dashboard which help establish insights to your fleet.

Driver Score	Rates your drivers based on speeding, after hours driving, and excessive idling
Idle Time	Compares time spent idling as a percentage of the total driving time
Activity	Analyzes the time spent in different zones: at the office, home, and customer zones
Stops	Visualizes the number of stops made
Business and Personal Use	Shows driver mileage for business and personal use while intelligently filtering away the drive to and from work

15.5 Email Report

There are several options which interact to affect where reports are sent.

SendReport	<p>is a flag which can be found on the Excel report itself. It can be calculated based on the values in that day's report or set to be always true. The other flags to control the sending of email are found in the application, on a per report basis.</p> <p>(Main menu > Administration > Reports... > Emailed reports > Select your report > Select the Email report tab)</p>
Email options	<p>controls whether the report can be emailed. Selecting this will display other options.</p>
Email report	<p>is an option to stop reports, while retaining all of the options set for emailed reports. It will be set to off if there is a problem with the reports, and they are too prolific or big (basically this is a failsafe for when a report overwhelms this system).</p> <p>Note: There are several options for controlling the report contents, which will not be discussed here.</p>
Email the report to me	<p>will send the report to you, as well as the group selected in Email receivers. If you redirect a report, it must go to an individual (not a group like email receivers).</p> <p>Redirection is intended as an aid when creating a report. You can redirect a trial run of the report to yourself, or any other individual, in order to verify the contents. Once you are satisfied with your report, you can turn the redirection off, and schedule it for your target audience.</p> <p>You can either redirect reports where SendReport is true or false. A situation where redirecting reports in which SendReport is false would be to see reports that would otherwise be undelivered (i.e. that failed your logic for setting the SendReport flag in your report).</p>

As a more concrete example, if the report audience is the executive group, Alice is setting up the report options, and it is redirected to Bob for testing:

Redirect	When Send Report is	SendReport (in report)	Send to myself	Report Recipients
on	on	true	n/a	Bob

on	on	false	n/a	no one
on	off	true	n/a	no one
on	off	false	n/a	Bob
off	n/a	true	on	exec, Alice
off	n/a	true	off	exec
off	n/a	false	on	no one
off	n/a	false	off	no one

15.6 Email limitations

In order to preserve the quality of service when using the application there are a number of limitations applied to the number of emails which can be sent at a time, and the size of each individual message.

- Attachments cannot exceed 10 MB
- The total data usage of emails per hour cannot exceed 1000 MB
- The total number of emails sent in an hour per rule cannot exceed 1000
- The total number of emails sent in an hour per report cannot exceed 1000

15.7 Disabled Reports

A report will be disabled if it becomes too large or too slow to open. If this happens, a notification will be created.

Please examine:

Template Macros	Macros can slow down a report. A macro that was working well with a small number of vehicles might not scale if you have increased your fleet.
Number of vehicles	If your fleet has really grown, you might consider splitting your report into multiple reports.

After you have made your changes, go to the report and set **Email report** to **On**. (Main Menu > **Administration** > **Reports...** > **Emailed reports** > Select your report.)

15.8 Running Reports

While the Administration/Reports section allows you to configure a report, you must go to the associated report to actually run the report, as you need to set options to select

your vehicles, times, etc.

Vehicle-related reports can be found by selecting **Vehicles** from the main menu, then clicking the **View** dropdown menu and selecting a report. This includes the watchdog report.

Activity-related reports can be found by selecting **Activity** from the main menu. For example, IFTA, Drivers Congregating, HOS, etc. Then, as before, configure the options and click the **View** drop-down menu to select a report.

15.8.1 Watchdog Report

The watchdog report helps you focus on the vehicles which deserve deeper examination. If a vehicle is not moving, or has not communicated for a period of time, it may be perfectly fine (parked for a battery change), or may indicate another issue.

There are different types of communication messages sent by the vehicle’s Telematics Device. When a vehicle is running, it will send trip report messages which include its location. When a vehicle is turned off, heartbeat messages are sent. For the first 48 hours a vehicle is turned off, a heartbeat message is sent approximately every half hour. After that, heartbeat messages are sent every 23 hours. (23 hours instead of 24, so that the time the message is sent will rotate.) All types of messages rely on network communication. A vehicle is considered to be not communicating if no messages of any sort are being sent. Historical vehicles are excluded from the report.

To access the report, select the **Vehicles** option on the left-navigation menu of the main application page. Click on the **View** dropdown and select **Watchdog Report**. You can view the list, download a PDF, or download an Excel spreadsheet with the same information. The latter provides the most flexibility.

The Excel version of the report has 3 visible tabs:

Report Tab

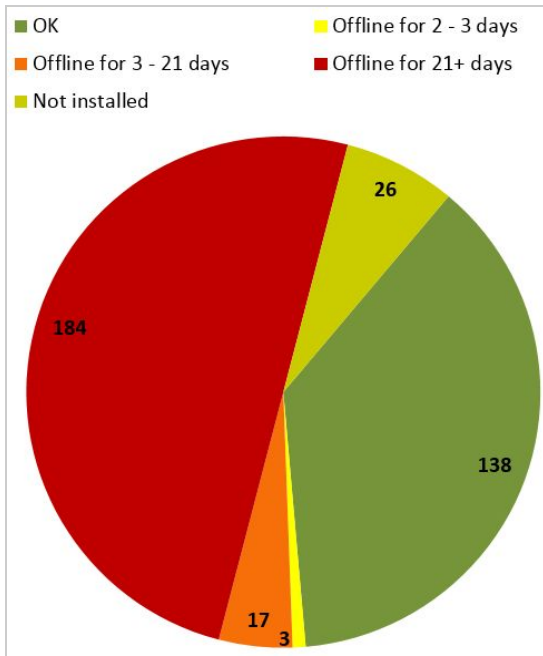
Each row in the Report tab provides the following data:

Vehicle	Vehicle name
Group	Vehicle group(s)
Last Known Address	Last communicated location. If the vehicle is active, but the Telematics Device is not communicating, then the vehicle’s actual physical location will be different. If the location is resolved to a zone, the entire address field will be displayed in a blue font, including the zone name(s) and address. If it does not resolve to a zone, then the address will be listed in black.

Last Communication Date	The date and time of the last device communication, heartbeat or otherwise, if delayed. To unclutter the report, the date is left blank for vehicles with an "OK" status.
Days Since Moved	Number of days from the date on which the vehicle last communicated location information (trip report) to the time at which the report was produced, if delayed. To unclutter the report, the date is left blank for vehicles with an "OK" status.
Days Since Communicated	Number of days from the date on which the vehicle last communicated any type of record to the date at which the report was produced. As long as a vehicle has network coverage, it will continue sending out "heartbeat" message logs, even if the vehicle is turned off. Note, if the vehicle was turned off and not moving while the device kept communicating heartbeat messages, but then a week later the heartbeat messages also stopped, then Days since moved and Days since communicated will be a week apart. If both trip and heartbeat communication failed at the same time, then the dates will match.
Serial Number	Serial number of the Telematics Device in the vehicle.
Status	Interpretation of the vehicle's status, based on the Last Communication Date and the customizable parameters to set time ranges. Refer to the knowledge base article for more information on customizing this report.
Map View	Quick link to display the vehicle on a map. Only clickable in the PDF or Excel reports — not the application interface.

Chart Tab

The chart tab shows a graphical view of the status. The numbers are the actual number of vehicles in each category, not the percentage.



Summary Tab

The summary tab shows a vehicle-by-vehicle list of the vehicle status and the days since last communication.

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16 Vehicle Maintenance

You can easily prioritize the repairs for your vehicles based on active diagnostic faults using in-depth engine health information. By focusing on proactive vehicle maintenance, your fleet will begin saving on costly vehicle repairs by detecting issues early and preventing them from developing into larger problems.

Even the simplest vehicle repairs can become a drain on your bottom line. Prevent vehicle misuse with our industry leading Telematics Device.

16.0.1 Insurance discounts

Did you know that our fleet management system can help you lower your insurance rates? Insurance premiums can increase as a result of accidents, speeding tickets, and other unexpected incidents. A growing number of insurance providers offer usage-based discounts. Contact your insurance provider today to find out if you qualify.

16.1 Maintenance reminders

Remembering when to perform oil changes, tire rotations, and other minor automotive services can be completely automated using accurate GPS fleet tracking to monitor the usage of your fleet. You can create recurring reminders that will let you know when a vehicle is due for service.

Navigate to **Engine & Maintenance** from the main menu. Select **Reminders...** > **Reminder rules** from the sub-menu. Your maintenance reminders will be listed.

The screenshot shows the 'Reminder Rules' interface. At the top, there is a search bar labeled 'Name', a dropdown menu set to 'Sort by: Rule', and an 'Add' button. Below the header, three reminder rules are listed in a table-like format:

Reminder Rule #1	Reminder rule type: Oil change	Kilometers: 5000
Reminder Rule #2	Reminder rule type: 10K Service	Month(s): 6 Kilometers: 10000
Reminder Rule #3	Reminder rule type: A Service	Kilometers: 10000

To create a new rule, click the **Add** button at the top.

This screenshot shows the 'Reminder Rules' interface with no rules listed. The search bar, sort dropdown, and 'Add' button are visible at the top. Below the 'Reminder Rules' header, a message states: 'No reminder rules have been set up yet. Click Add to get started'.

When creating your new rule, choose from the following criteria to notify yourself or others:

- A reminder rule type, such as oil change
- When you should be reminded. This can be based on:
 - time
 - recurring every X months
 - once on a specific date
 - vehicle use
 - mileage
 - hours of engine use

Reminder Rule ?

Conditions

Vehicles

Description:

Reminder rule type: Oil change ▼ Add new type

Create reminder based on time: No Reoccurs every Once-off

month(s)

Create reminder based on usage: No Mileage Engine hours

km

16.2 Recording Completed Maintenance

Recording that you have completed the maintenance service is optional. The reminders you have set will still continue even if you do not record the outcome. The reminder schedule is not linked to your actual completed dates. If you wish to change your next reminder, you must change the reminder rule.

To record a completed maintenance, navigate to **Engine & Maintenance** from the main menu. Select **Reminders...** > **Reminders Due** from the sub-menu, select your vehicle, and click **Apply changes**. A list of your maintenance reminders will be displayed.

Select the vehicle/rule combination for which you want to record completed maintenance from the list. Click on the desired vehicle's reminder (there may be several reminders). The **Maintenance History** screen will now be displayed.

Click on the maintenance event that was completed. You will now see the edit screen for that event. Update the page with your known information. For example, the exact date and odometer reading when an oil change was performed.

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17 System Options

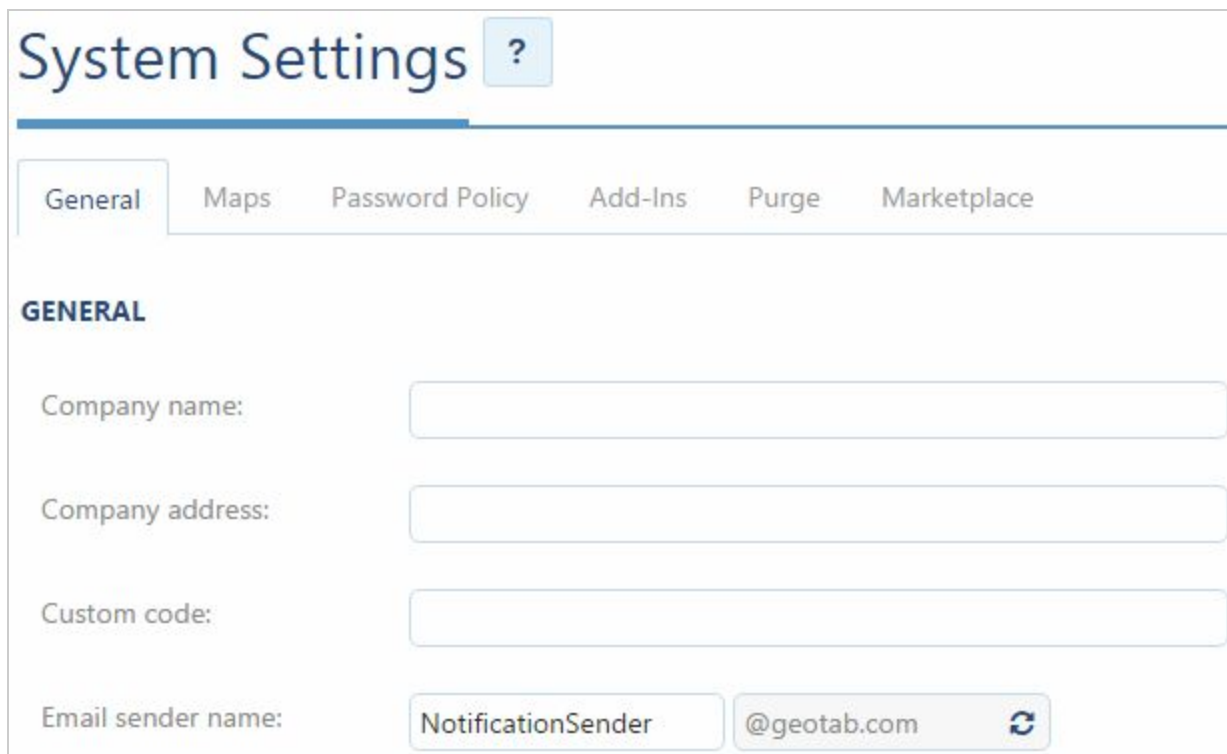
We offer an intuitive and flexible interface to manage your fleet. For system administrators, there are a number of preferences available that can be applied to your entire fleet of vehicles and to the users who manage them.

17.1 Changing system options

Navigate to **Administration** from the main menu. Select **System...** from the sub-menu to display the following options:

17.1.1 System Settings

Details about your organization and some default settings for all vehicles. Under the **Maps** tab, you can change your default map provider or create custom maps.



The screenshot shows the 'System Settings' page with a help icon (?) next to the title. Below the title is a horizontal menu with tabs: 'General', 'Maps', 'Password Policy', 'Add-Ins', 'Purge', and 'Marketplace'. The 'General' tab is selected. Under the 'GENERAL' heading, there are four input fields: 'Company name:', 'Company address:', 'Custom code:', and 'Email sender name:'. The 'Email sender name:' field is pre-filled with 'NotificationSender' and '@geotab.com', and includes a refresh icon.

17.1.2 Audit Log

Lists notable events which had occurred. This report is useful for tracking changes to your account when multiple users have administration access.

17.1.3 Performance Report

Used to diagnose the performance of the Telematics system.

17.1.4 Import Export Database

Database administration options to move and backup your entire database.

17.1.5 Keys & RF

Used to create and read legacy touch keys, configured radio downloaders for legacy installation types using radio frequency passive tracking.

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18 Engine Data

Your Telematics Device is designed to collect and respond to status information in your vehicle. The port it is installed in is traditionally used for on-board diagnostics from the vehicle's manufacturer.

Your Telematics Device responds to changes in your vehicle in the following areas:

- Engine RPM
- Battery voltage
- Engine warning light on (MIL)
- Seatbelt usage
- Odometer
- Engine hours (PTO)
- Emission faults
- Vehicle identification number (VIN)

Please be aware that due to differences in vehicle manufacturers, the actual engine information available in your vehicles may vary. We are constantly expanding the number of supported vehicles and features, and regularly distribute firmware updates as necessary.

Note: If when installing your Telematics Device you experience issues such as power loss, vehicle stalls, or engine lights turning on, you may have an incompatible vehicle. Please remove the Telematics Device and contact your authorized reseller.

18.1 Understanding your vehicle

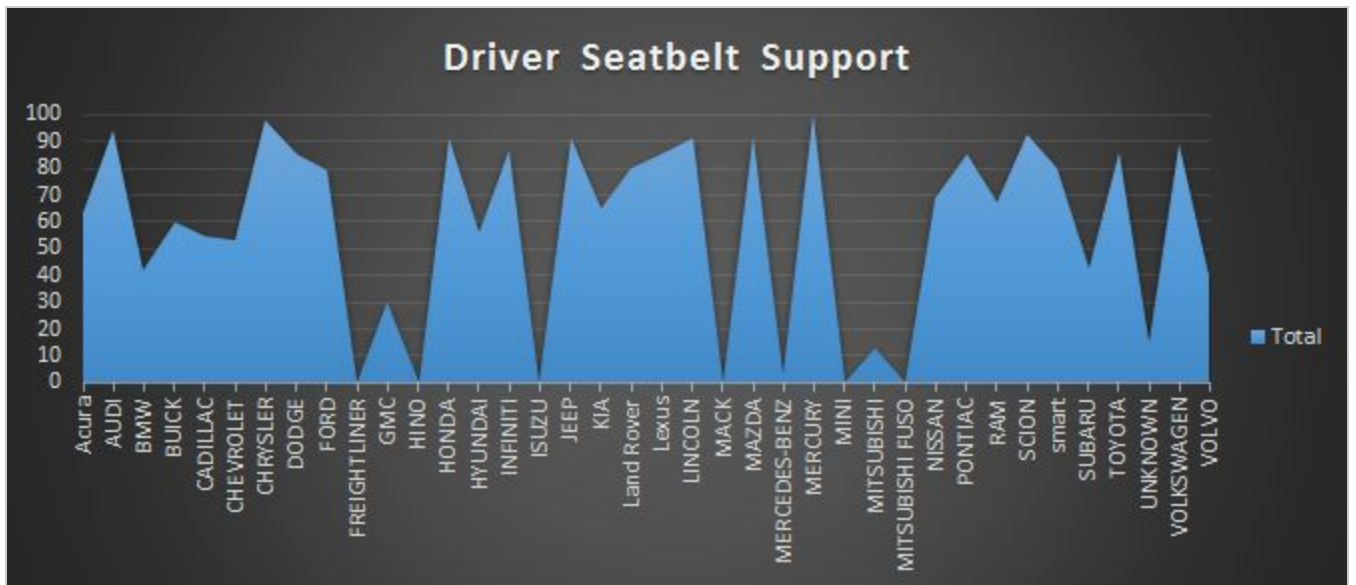
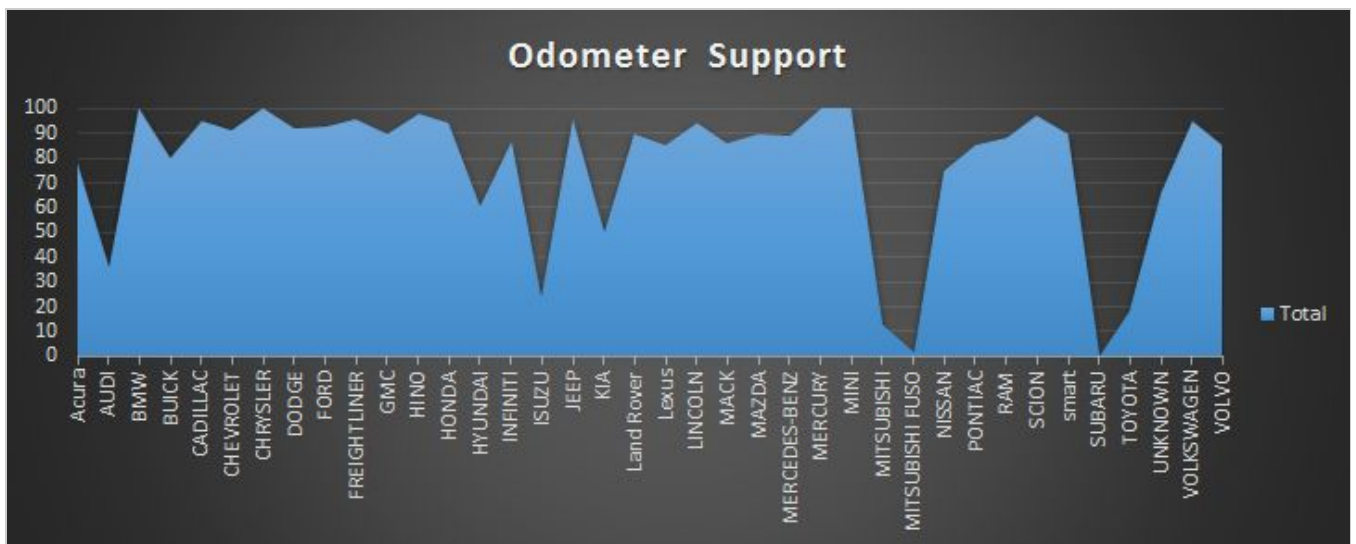
Authorized resellers have access to a proprietary tool which is used to automatically discover the available engine information for your vehicle. This is done by providing your vehicle identification number (VIN) to your reseller. The VIN is usually located on your

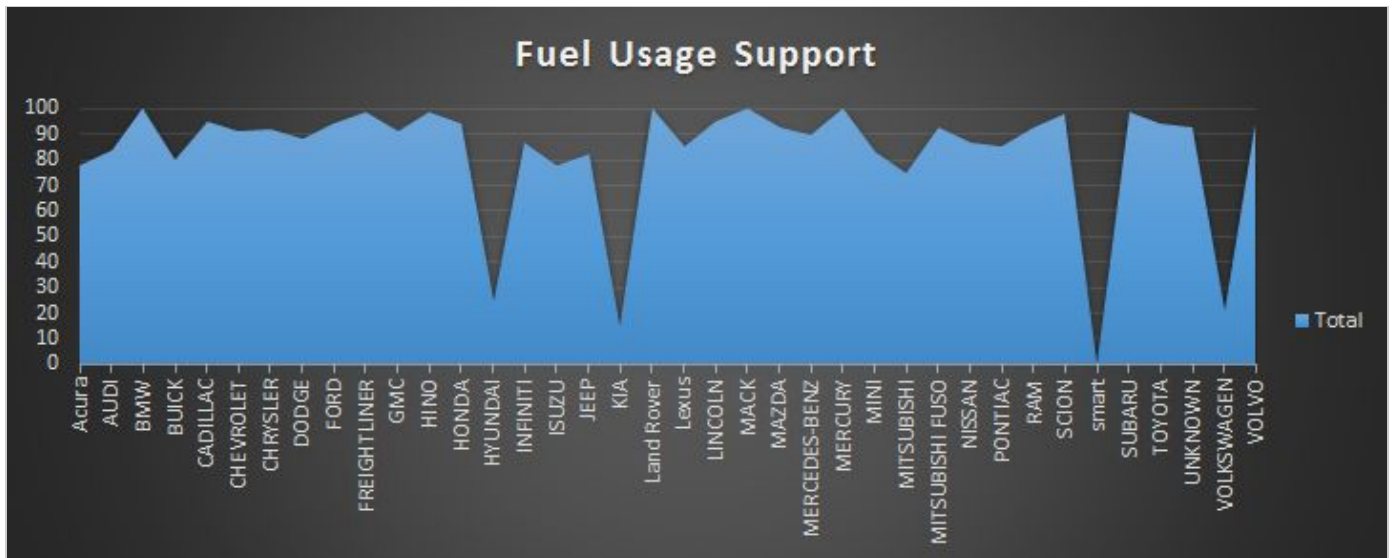
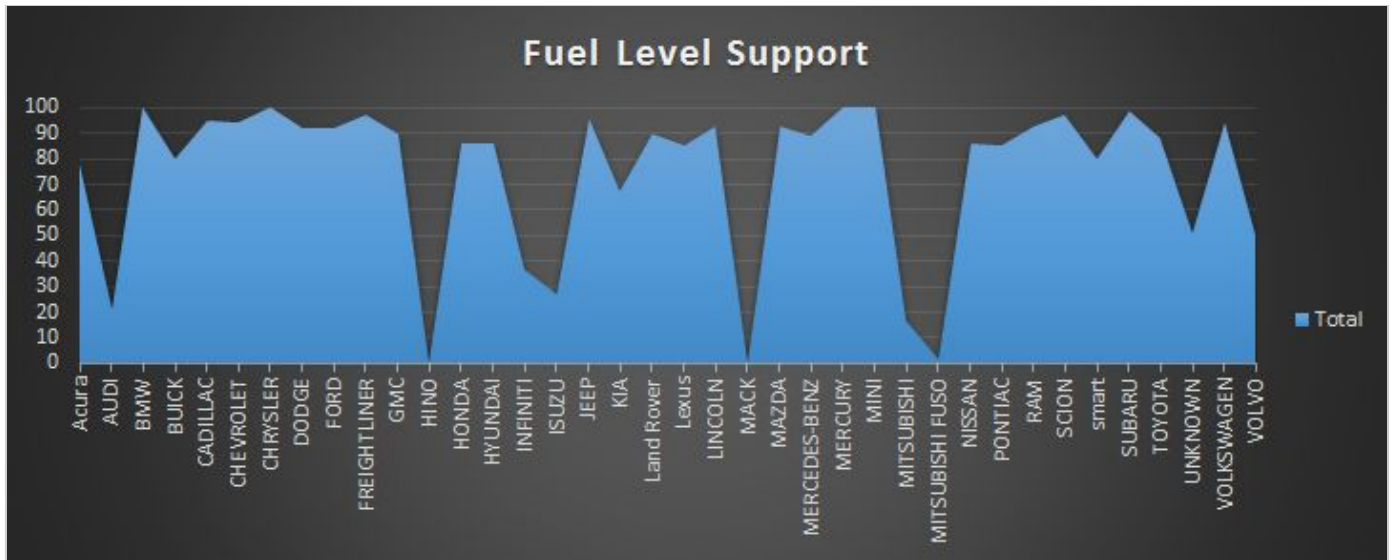
dashboard.

In order to determine whether a vehicle is driving, stationary or turned off, the system uses patented technology to examine vehicle battery voltage, movement by use of accelerometer, GPS location and available engine status information. This allows the system to be used in vehicles that do not include an engine bus, in new electric or hybrid vehicles, commercial vans, and large trucks.

18.2 Current vehicle support

Use the following charts as a guide as the compatibility of your vehicles with certain features. For the most up to date information please contact your authorized reseller.





18.3 Vehicle odometer

In most cases, your Telematics Device automatically records your odometer value.

The IFTA report relies on the odometer history.

For some vehicles, automatic recording of odometer reading may not be available because the manufacturer does not provide it, or it is not yet supported. If unsupported, you can update the odometer in your account by manually entering your vehicle's current odometer reading.

The application retroactively corrects historical odometer readings based on the most recently entered value (whether manually or automatically recorded). This most recent value is always assumed to be correct and overrides all previous entries or corrections.

Incorrectly entered information can result in inaccurate reports:

- Incorrectly copying of or entering of an odometer value might produce negative historical trip values.
- When a Telematics Device firmware update introduces automated odometer tracking for a vehicle whose odometer values were previously manually — but incorrectly — entered, it could produce a jump in the value.
- If a Telematics Device is moved from one vehicle to another, but the old vehicle was not marked as “historical”, then odometer readings for multiple vehicles are combined. This could result in sudden jumps or past negative trips.

Recommendations:

- Double check your manual odometer readings and entries.
- When permanently transferring your Telematics Device to a new vehicle, set the previous vehicle to historical to preserve your location data, and then create a new vehicle.

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19 Software Development Kit (SDK)

We recognize that when you’ve invested significant time and money in your IT infrastructure you want to get the most out of it. You can integrate your fleet telematics data into your own software by leveraging our easy to use software development kit (SDK).

With the SDK you can create new reports, schedule data requests to import to your own software or even build entire applications centered around your own fleet. You will be able to get started quickly and find help when you need it easily with dedicated and responsive support channels.

19.1 Supported platforms

Whether you are building a web, mobile, or desktop application with the SDK, there are many options for programming languages to use. The SDK is available in the following ways:

- HTTP JSON web service
- Native C# library
- Native JavaScript library

19.2 Getting started

Start developing today using our comprehensive getting started guides, sample projects, database schemas and more. Get involved, ask questions, and have them answered by dedicated support staff focused only on our telematics products.

Read the SDK documentation online, which includes links to download the latest SDK and samples. The SDK is accessible from your browser by simply adding SDK to the end of the URL you are on now. For example, <https://my.geotab.com/sdk/>. Get involved with the community by visiting our forums.

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20 Features Table

	Base	Pro	ProPlus
Device			
Advanced Trip Recording – Patent. Accurate road tracking and GPS distance. Gold Standard Mileage recording (chosen by UPS)	YES	YES	YES
Device Trip Memory Storage (up to 1 month of driving) out of cellular network range	30,000	30,000	30,000
Active Tracking for emergency vehicles (position shown within 10 yards of actual)			YES
Live Buzz in vehicle on posted road speed warnings			YES
Live vehicle on map animation			YES
Over The Air Firmware Update	YES	YES	YES
Over The Air Upgradable to other plans	YES	YES	YES
Over The Air Push Parameter Changes	YES	YES	YES
Internal GPS antenna	YES	YES	YES
IP indemnification	YES	YES	YES
Simple Plug-Connect Installation	YES	YES	YES
Position instantly available after cold start (ephemeris)	YES	YES	YES

Record Installation (date/time/location stamp) where unit connected	YES	YES	YES
Estimated Odometer & Engine Hours (not based off engine data)	YES	YES	YES
Actual Engine Hours & Odometer from Engine		YES	YES
Fallback ignition detect using accelerometer & voltage. Patent pending.	YES	YES	YES
GPS Additional Accident Memory Storage – 100 minute (1 sec resolution). Auto detection/upload on accident.		YES	YES
Record Tampering – unit unplugged (date/time/location stamp)		YES	YES
In-Vehicle Audible Alerts / driver feedback		YES	YES
Speed Warning		YES	YES
Speed Alert		YES	YES
Alert on Rule Violation		YES	YES
Over-Rev (high RPM – target fuel savings)		YES	YES
Seatbelt Not Used Over X Speed		YES	YES
Driver Key Not Inserted on Ignition On (optional for use with Driver ID Key)		YES	YES
Self-Calibrating on installation to match vehicle OBD/CAN protocol		YES	YES
OBD: J1850 VPW, J1850PWM, SAE 9141, SAE 14230, OBDII over CAN (gas, diesel, hybrids)		YES	YES
Trucks: J1708, J1939, CANBUS		YES	YES
VIN (Below are always requested and recorded if supported by vehicle)		YES	YES
Odometer		YES	YES
Coolant Temp		YES	YES
Driver's Seatbelt		YES	YES
Passenger Seat Occupied		YES	YES
Passenger Seatbelt		YES	YES
Total Fuel Used		YES	YES
Total Idle Fuel Used		YES	YES

Fuel Level Input (to identify fuel up events – for data integration with fuel card)		YES	YES
RPM		YES	YES
Ignition Detect		YES	YES
Check Engine Light		YES	YES
Record Engine Faults including unknown proprietary engine faults		YES	YES
Voltage Monitoring on crank (identify electrical battery health)		YES	YES
Hourly battery heartbeat (identify battery drain – door open/light left on)		YES	YES
Accelerometer Self-Calibrating (no vehicle setup required)		YES	YES
Detect Aggressive Cornering		YES	YES
Detect Aggressive Acceleration		YES	YES
Detect Aggressive Braking		YES	YES
Detect Impact accident when Parked / Ignition Off		YES	YES
Detect if being towed (moving with ignition off)		YES	YES
False Positive Filtering (does not record railroad tracks, speed bumps or potholes as aggressive driving)		YES	YES
Expansion		YES	YES
Support enabled for IOXs including, AUX, DJ,NFC, Serial & Temp etc.		YES	YES
Support for third-party IOXs with no licensing		YES	YES
Auxiliary IOX (inputs)		EXTRA	EXTRA
Iridium satellite connection IOX		EXTRA	EXTRA
DICKEY-john salt spreader IOX			EXTRA
Serial Port to third-party IOX		EXTRA	EXTRA
GO TALK IOX		EXTRA	EXTRA
Driver ID using NFC IOX		EXTRA	EXTRA
Mobileye IOX			EXTRA

Loud Buzzer IOX		EXTRA	EXTRA
USB Power IOX		EXTRA	EXTRA
Garmin connection IOX		EXTRA	EXTRA
Garmin used for dispatch (includes all messaging/navigation features below)		EXTRA	EXTRA
Dispatch to address and navigation		YES	YES
Send multiple routes and autoselect next		YES	YES
Canned messages server configurable		YES	YES
Driver Status Select		YES	YES
Garmin power under device control		YES	YES
Garmin NHTSA Hours of Service for highway truck fleets (includes all HOS features below)		EXTRA	EXTRA
Certified Government Compliant		YES	YES
Uses Garmin Dezl 760		YES	YES
Truck specific features and routing		YES	YES
Includes July 2013 regulation changes		YES	YES
Drive App HOS		EXTRA	EXTRA
Drive App FMCSA DVIR (includes all relevant features below)		YES	YES
Requires extra third-party mobile device/tablet and data plan		EXTRA	EXTRA
Requires IOX to connect to mobile device/tablet		EXTRA	EXTRA
Includes Drive App		YES	YES
Driver login		YES	YES
Certified Government Compliant		YES	YES
Works alongside other third-party applications installed on mobile device/tablet		YES	YES
Text Messaging		TBA	TBA
Driver Feedback using rules		TBA	TBA
Navigation using built in Navigation		TBA	TBA
Navigation using optional purchased third-party navigation like Navigon		TBA	TBA
Oil Field and Salesman regulations		TBA	TBA

Canadian HOS regulations		TBA	TBA
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User Interface

Web-based real-time tracking	YES	YES	YES
Web-based trip log	YES	YES	YES
Unlimited Customer import & Geofencing	YES	YES	YES
Powerful Business Exception Rules	YES	YES	YES
Combination Exception Rules	YES	YES	YES
Email/realtime/web popup notification on rule violation	YES	YES	YES
Notify driver in vehicle on rule violation		YES	YES
Detect Reversing/Backing-Up		YES	YES
Out/in zone Exceptions	YES	YES	YES
Posted road speed using OSM and/or Navteq Exceptions	YES	YES	YES
Backup detection Exceptions		YES	YES
Engine diagnostics Exceptions		YES	YES
Dangerous driving Exceptions	LIMITED	YES	YES
Accident Exceptions		YES	YES
After hours usage Exceptions	YES	YES	YES
Customizable dashboards	YES	YES	YES
Trending dashboards & reports	YES	YES	YES
Scheduled Reports	YES	YES	YES
Use Excel to customize all reports	YES	YES	YES
Dispatch closest to address	YES	YES	YES
Dispatch routing and send route		YES	YES
Dispatch text messaging & status through Garmin & Drive		YES	YES
Dispatch Colors based on driver status	LIMITED	YES	YES
Private vs Business mileage	LIMITED	YES	YES
IFTA Fuel Tax Reporting		YES	YES
Maintenance Reminders		YES	YES

Driver Scoring	LIMITED	YES	YES
Risk Management Reporting (Insurance)		YES	YES
User Access. Any features can be hidden based on users group. Limit to vehicle groups. Multi-purpose.	YES	YES	YES
Full auditing	YES	YES	YES
Flexible group structure for vehicles, zones(customers), users, rules, drivers & reports	YES	YES	YES
Break down customer stops by category	YES	YES	YES
Driver congregation	YES	YES	YES
Accident reconstruction report		YES	YES
Vehicle Health monitoring		YES	YES
Customizable PTO names and reporting		YES	YES
Fleet Savings (Maintenance, Fuel, Check Engine, Battery/Coolant, Roadside Breakdown)		YES	YES
Driving Safety (Configurable Scorecards including Speed, Braking, Acceleration, Seatbelt, Custom)		YES	YES
Operation Efficiency (Time Card, Congregation, Route, Customer Visits, Trip History, Activity Summary)	YES	YES	YES
Highly scalable — up to 50,000 devices in one database	YES	YES	YES
Advanced Software Development Kit supports full integration & Customization	YES	YES	YES
C# & Javascript integration. Full AJAX/JSON interface	YES	YES	YES
Best-in-class 2nd-level support by top engineering team	YES	YES	YES
No limit on database size	YES	YES	YES
No limit on users	YES	YES	YES
Map & posted data license fees included	YES	YES	YES
Data backed up	YES	YES	YES
Industry best practises for security	YES	YES	YES

High uptime	YES	YES	YES
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20.1 Generic engine rules

As of the July 2012 firmware update for Telematics Devices, the vehicle will now use a generic engine ruleset for engine diagnostics. Previously, diagnostics were specific to every type of engine source, for example, fuel level for both J1708 and J1939. Now, there are generic and aggregated diagnostics which makes creating rules and generating reports for a fleet with multiple engine types much easier.

Exception rules created with specific engine types will no longer create exceptions after the firmware has been upgraded. Follow these steps to re-enable exception reporting.

1. On the **Exception Rule** page (**Rules & Groups > Rules**), check whether any rules on your account use an engine type (that is, if they have a name with an engine source type in parentheses as shown below).

The screenshot shows the 'Exception Rule Edit' page with three tabs: 'Name', 'Conditions', and 'Notifications'. The 'Conditions' tab is active. Below the tabs, there is a 'CONDITIONS' section with several buttons: 'Add engine', 'Add zone or zone type', 'Add speed', 'Add speed limit', 'Add duration', 'Add distance', and 'More...'. Below these buttons, a text box contains the condition: 'Value of (Status Data Diagnostic "Fuel Level (J1939: 96)") < 50'. At the top of the form, there are 'Save' and 'Remove' buttons.

2. Under the **Conditions** tab, add a generic diagnostic to the conditions by using the **Add Engine** button.

CONDITIONS

[Add engine](#)
[Add zone or zone type](#)
[Add speed](#)
[Add speed limit](#)
[Add duration](#)
[Add distance](#)
[More...](#)

Engine

Type: [Active Fault](#) [Any Fault](#) **[Measurement or Data](#)**

Diagnostic:

[Display All Diagnostics](#)

Value: [Over](#) **[Under](#)** %

[Add](#) [Cancel](#)

Value of (Status Data Diagnostic "Fuel Level (J1939: 96)") < 50

3. Open the advanced rule conditions by selecting the script icon.



4. Remove everything except the content of the second term. As an example, you would keep the following: `IsValueLessThan[value=50%](FilterStatusDataByDiagnostic[diagnostic=DiagnosticFuelLevelId])`:

```

ADVANCED CONDITIONS EDITOR
The editor below allows you to double-check and fine-tune the condition structure to ensure it is correct. You can see a preview of your changes, in real time, in the box above.

And(
  IsValueLessThan[value=50%](
    FilterStatusDataByDiagnostic[diagnostic=a0Txskamy-ku_4XJltIZJVA]
  ),
  IsValueLessThan[value=50%](
    FilterStatusDataByDiagnostic[diagnostic=DiagnosticFuelLevelId]
  ),
)
    
```

5. When finished, you should have a rule that looks similar to the following:

CONDITIONS

[Add engine](#)
[Add zone or zone type](#)
[Add speed](#)
[Add speed limit](#)
[Add duration](#)
[Add distance](#)
[More...](#)

Status Data Diagnostic "Fuel level" < 50%

ADVANCED CONDITIONS EDITOR

Use the advanced editor below to create custom conditions which combine different aspects of your vehicle such as engine health, vehicle speed and location. The rule you create will be shown using specially formatted syntax and can also be modified to adjust individual values.

```
IsValueLessThan[value=50%](
  FilterStatusDataByDiagnostic[diagnostic=DiagnosticFuelLevelId]
)
```

20.2 Driver ID Relay

Turn Driver ID Relay on

Turn Driver ID Relay off

Use driver key to control Driver ID Relay

<p>Turn Driver ID Relay On</p>	<p>Pressing this button engages the Driver ID Relay and overrides a Driver’s ID key. The setting will take effect immediately if the vehicle is currently connected to the service or, otherwise, the next time it communicates.</p>
<p>Turn Driver ID Relay Off</p>	<p>Pressing this button turns the Driver ID Relay OFF and overrides a Driver’s ID key. The setting will take effect immediately if the vehicle is currently connected to the service or, otherwise, the next time it communicates.</p>
<p>Use driver key to control Driver ID Relay</p>	<p>Pressing this button returns the Driver ID Relay settings to default. The External Relay will be controlled by the Driver’s ID key if Driver Identification Reminder is enabled under the Driver Feedback tab. The setting will take effect immediately if the vehicle is currently connected to the service or, otherwise, the next time it communicates.</p>

20.2.1 How to Turn Driver ID Relay on/off

1. Log in to the database where the device is located.

2. Select **Vehicles** from the main menu.
3. Select the device you are installing.
4. Under the **Device** tab, click on **+More Details**.
5. Select **Turn Driver ID Relay On/Off**

Note: If a driver forgets their key, you could use this feature to turn off the Driver ID Relay temporarily.

20.2.2 Use driver key to control Driver ID Relay

This setting will return Driver ID relay control to the driver's key. That is, if the driver ID key fob does not touch the NFC reader, then the device will beep and the relay will not engage.

1. Make sure the SPR-RELAYKIT and NFC Reader are installed in the vehicle.
2. Prior to Relay Kit installation, follow the steps below:
3. Log in to database where the device is located.
4. Select **Vehicles** from the main menu.
 - a. Select the device you are installing.
 - b. Select the **Driver Feedback tab**
 - c. Toggle **Driver identification reminder** to **On**.
 - d. Go to the **Device** tab.
 - e. Click on **+More Details**
 - f. Scroll down to the **Driver ID Relay** label
 - g. Click the **Use driver key to control Driver ID Relay** button.

Note: Settings are not immediately applied to the device — like firmware updates, changes in settings are transmitted over the air. Once you save any changes, a message is sent to the device with the updated values. You may need to wait 5 minutes or perform ignition cycles and take a trip before the update is complete.

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21 Business Examples

Learn how businesses use our telematics solution to control costs through saving time and costs of operating their fleets. Below are recent examples of what our customer have done to get the most out of our system.

21.1 Safety

- Set up exceptions for dangerous driving
 - speeding against posted speed limits
 - harsh brake

- dangerous lane changes/aggressive driving
- after hours use
- driving with no seatbelt
- Limiting backing up (and ensuring backing first)
- Seatbelts are used much less than expected — by monitoring, compliance can go from 80% to 99.8% (large fleet case study)
- Notify the driver by buzzing in the vehicle
- Driver safety scorecard
- Who to email/alert in case of accident — set up a procedure when accident happens
 - Auto retrieve
 - Accident reconstruction from data
- Detect distracted driving — big issue

21.2 Productivity

- Import customers using the built-in wizard or use the SDK to sync customers in from another system automatically
- Use groups for different customer types. That way reports will group and categorize automatically
- Get minutes per customer visit or minutes spent visiting by category
- In an actual case study, a large company using our solution saves 3% on labour by monitoring how much time was done doing their customers' deliveries
- Report the number of customers visited by each driver per day
- Manage the time employees are at the office. Paid time vs. personal time (lunch and break abuse)
- Look at the total time each day employees spend driving slowly or idling (i.e. caught in traffic)
- Graphically monitor day's trips with exceptions. In an actual case study, a large company using our solution saved more than 2% of their mileage by avoiding bad driver decisions like bad routing or unnecessary stops
- In an actual case study, a large company using our solution reduced the supervisor headcount from 30:1 to 50:1 by using the application as a tool to manage driver activity
- Set up allowed time for stops, and through routing get planned routes vs. actual activity
- Set up allowed travel times and compare planned vs. actual
- Dispatch Overlap
- Excess Miles — Best route taken? Off Area Mileage?
- Segmented analysis of work day

21.3 Fleet

- A fuel-saving calculator spreadsheet is available to show the fuel saving from managing using our solution

- High CO ratio detected by engine computer indicates vehicles wasting fuel and needing a service
- Fuel is saved by limiting idling — buzz in cab and exception rule. Accurate fuel and CO2 measurement during idle time
- Enhanced idle time measurement
 - Beginning of Trip Idle Time (actionable)
 - End of Trip Idle Time (actionable)
 - Expected/Planned Idle Time per Route (Traffic Delays) (while not actionable, knowing this will tell you the best time that can be obtained)
- Miles per gallon and mileage compared against peers
- Mileage Reduction
- Email can be sent when the vehicle engine warning light is on — vehicle needs maintenance
- Email can be sent when employee leaves their car lights on or the battery is going to fail
- Email can be sent when the alternator fails
- Use the application to set up service intervals, tire rotation or even lease expiration
- Service intervals are based off odometer readings taken automatically from vehicle or by total engine hours (better metric for maintenance)
- The application automatically makes available accurate odometer and VIN for every vehicle
- The watchdog report is used to identify failed or tampered units
- An advanced user can use the vehicle engine codes to identify exactly what is wrong with a vehicle without even needing a diagnostic scan tool
- For asset utilization, the application can tell what percentage of vehicles are not being driven over time and by region. In an actual case study, a large company using our solution reduced their unutilized assets to 4% from the industry standard of 10% or more
- Prioritized engine fault codes
 - Ability to filter out noise or un-actionable events
 - Optional integration with Asset Management System to open work orders
- Fault code knowledgebase
 - Optional integration with Asset Management System to provide repair data
- Best repair practices
 - Data provides repair information
 - Reduced unneeded parts expense
- Condition exceptions and threshold alerts based on similar vehicles (peers)
- Scheduled component (brakes, starter, filters, alternator, etc.) maintenance based on:
 - Ignition Cycles
 - Hours
 - Miles
- Grade component (brakes, starter, filters, lubricant, etc.) wear based on driving habits (for example, jack rabbit starts, harsh braking, etc. all cause accelerated wear)
- Measurement of repair effectiveness. Was condition fixed the first time? Is there a direct correlation to breakdowns?

- Breakdown analysis: breakdowns vs. vehicle data. Could breakdown have been prevented?
- Provide mechanic with vehicle location. Reduces vehicle obtain time

21.4 Dispatch

- Find address or customer by customer name
- Find vehicles closest to an address or customer
- Click to send message to Garmin GPS within a vehicle to dispatch to that location or navigate the driver there
- Routes can be set up and driver dispatched to a route with automatic navigation to all destinations
- Statuses can be used by the driver in the Garmin to alert dispatcher about their availability
- Many reports to look at time spent driving, time spent stopped, etc.

21.4.1 Sustainability and Regulatory

- [Hours of Service regulations](#)
- [Driver Vehicle Inspection Report](#)
- [IFTA Fuel Tax reporting](#)
- Tax Mile Accuracy and Private Property Mileage Exclusion

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22 What's new

22.1 Firmware release notes for Telematics Devices

[Device Release Notes](#)

22.2 Application release notes

February 2016

- Hours of Service / Driver Vehicle Inspection Report
 - Display of driver's home terminal and principal place of business addresses will now be included in the HOS reports.
 - Added DutyStatusOrigin field to HOS Advanced Report. The report will now

display how the report was created (Driver, Admin, System or Unknown).

- SDK
 - Updated information for IOXAddon. TextToSpeechContent has been changed to GoTalkContent and RelayContent has been changed to IoxOutputContent.
 - LaunchAddin will now be fully implemented as a requirement for loading Add-Ins into the UI.
- Reports
 - Engine faults can now be sorted by device name.
 - Where applicable, first and last name entries are now included in the Advanced Reports.
- Localization
 - Improved French, German, Spanish and Vietnamese language translations.
- Minor UI Improvements
 - A notification will now be provided to users of Internet Explorer 9 informing them that the browser will no longer be supported. The end date for Internet Explorer 9 support is May 2016.
 - A new icon has been added to help users differentiate between Routes and Route Plans of the same name in the drop-down search filter.
 - Route stops are listed numerically. Maps will now have identical numbering displayed on the map to aid in viewing of trips.
 - Improvements to the UI for the Defect List and Part List.
 - Display of Exception Report context data has been re-worked to improve clarity.

January 2016

- Fill-Ups
 - Unmatched fill-up transactions can optionally be included in the Fill-ups report. These transactions will be listed under "Unknown Vehicle".
- Map
 - Users can now lock the live map screen to a specific view so that when the map refreshes, it will stay at the current view.
- Hours of Service / Driver Vehicle Inspection Report
 - Annotations were added to the Advanced Duty Status Report.
 - When adding a new defect to the driver vehicle inspection report (DVIR), you can select from a template to default to Canadian or American values.
 - Hours of service (HOS) logs that are created manually can now be distinguished from those that are created automatically.
- SDK
 - Support for third-party messages added to the public API (see [SDK What's New](#) for details).
- Audible Notifications

- Optionally alert the driver to delayed notifications. This is most relevant in situations with poor connectivity, or if a device is not on the ProPlus plan (which has timelier data).
- Localization
 - Added support for the Vietnamese language.
- Minor UI Improvements
 - Updated text for Japanese and Spanish versions.
 - Edit forms are improved for mobile devices.
 - Clarified the description regarding VINs (Vehicle Identification Numbers) on the Device Edit page.
 - Added additional map provider options and assignment. No action is required by existing users.
 - The fill-ups and speed profile icons have been changed to a bar chart icon.

December 2015

- Map
 - When multiple trips are selected on the Trips history page, mousing over a trip from the left-side list will highlight the corresponding trip on the map.
 - The Nearest button shows the distance from the vehicle to the selected location in a tooltip. When the button is toggled on, the tooltips and vehicle are shown. When toggled off, the vehicle remains visible on the map but the tooltip is hidden.
 - Vehicles can be dispatched directly from the Live Map.
 - Replay a trip through Google Street View using the "Trips street view" Add-On – with options to pause, rewind, and skip ahead.
- Reports
 - Added fill-ups to Excel reporting. You can now download, customize, create dashboards, and schedule Excel reports for fill-ups.
 - Evaluate fill-ups for potential discrepancies, such as fill-up being larger than the known tank size, mismatched locations, etc. Note: these are just approximations and only identify fill-ups that need to be inspected.
 - The first day of the week can now be set to Saturday, Sunday, or Monday from the user preferences page. The chosen first day of the week is reflected in reports and dashboards.
 - The Time Card report, when run manually, can be optionally restricted to run only for work hours on the dashboard and emailed reports.
- Localization
 - Improvements in German and Japanese text.
- Minor UI enhancements
 - Groups with large numbers of sub-groups can expand and collapse subsets.
 - Permission to edit the dashboard has been added to the clearance "Change your own user options".

- Minor restyling of the product guide.

November 2015

- Active Tracking enhancements
 - Active Tracking can now be enabled for groups of vehicles. This allows you to enable Active Tracking for an entire fleet at once.
 - Animation speed is increased.
- Hours of Service
 - Hours of Service (HOS) availability now loads all drivers by default.
- Marketplace
 - By default, users will see all available Marketplace applications. These include both free and paid applications. Administrators can configure the Marketplace to display only free applications.
- Zones
 - Zones can now be created from Google .KML files using the [Import KML Zones Add-In](#).
- Groups
 - When a vehicle is assigned to multiple groups, you can remove it individually from one of the groups, leaving the other assignments in place.
- Localization
 - Default reports support multiple languages.
 - Improved Japanese language legibility with Noto Sans Japanese font.
 - The placeholder text for input fields and button tooltips support multiple languages.
- Access controls
 - Security clearance "Administer devices delete/unplug/replace" can be set on a per user basis. This clearance is now needed to makes changes on individual vehicles.
- Minor Interface Enhancements
 - Vehicles are identified as "historical", rather than "historic". There is no functionality change.
 - A cancel button was added to the rule edit page.
 - The placeholder text for input fields and button tooltips support multiple languages.
 - Route and Route plan changes include: numbering route stops; adding a drag icon to routes on a list; warning that if a trip is optimized it may change your stop order; clarified that optimization is based on shortest distance.

October 2015

- The list of parts and corresponding defects used by the driver vehicle inspection

report (DVIR) can be customized for both vehicles and trailers. This is available under system settings.

- Both text messages and single-point destination dispatch messages can be sent to the hand-held Drive app. This is available as a Feature Preview option.
- Notification "Assign to group" allows you to assign a device to a specified group when an exception rule is broken.
- Speeding rules have a new condition type that specifies the source of the speed limit information. The speed limit provider options are: commercial, community or the default "all".
- New databases can be registered via the API (as well as the previously supported UI option).
- Security improvements. This is not the result of any security breaches. It is just part of our on-going, preemptive efforts to keep your data secure.
- We continue to refine our international support, including German street address layouts and translation placeholders for Add-Ins.

September 2015

- Active Tracking — which can be enabled vehicle by vehicle — has the following features:
 - Near-live vehicle animations on a map for critical applications such as ambulances and police vehicles.
 - Live, time-sensitive notifications such as posted road speed warnings.
 - **Enabling Active Tracking will automatically activate the ProPlus rate plan.**
- ProPlus — the ProPlus plan is now available. Billing at the ProPlus rate comes into effect for all installations using Active Tracking. Installs with IOX-CAN and IOX-RS232 will also be moved to the ProPlus plan (as their features require the use of additional data). You can view your current rate plan by going to the **Vehicle Edit** page.
- The SDK has been updated with new documentation, a new interactive runner, a preview of new objects and methods, along with a visual overhaul.
- Hours of Service (HOS) and Driver Vehicle Inspection Reports (DVIR) are supported in the API. You can retrieve data about HOS availability and violations, shipment logs, and trailers. Key objects are AnnotationLog, DVIRLog, DutyStatusAvailability, DutyStatusLog, DutyStatusViolation, ShipmentLog, and Trailer.
- New databases can be created through our API.
- During database registration, a dynamic preview of the URL for accessing the database will be shown based on the company name entered.
- California Hours of Service (HOS) rules are supported for property and passenger carrying commercial motor vehicles.
- The reminders report has a warning icon to identify vehicles in need of service.
- The risk management report lists the maximum vehicle speed.
- The directions report has multi-language support.

August 2015

- Forgot your password? Enter your email and database and a reset password link will be emailed to you.
- Maintenance history and reminder rules have been substantially revised for easier use.
- Stay informed about relevant news, web portal maintenance alerts as well as new features. You may receive a green pop-up from time to time, which is also accessible in your notifications list. You can change your preference on receiving these alerts by clicking on your username in the top right corner and selecting Options.
- Toggling an exception on the map legend now also toggles the exception icon against the live vehicle or historical trips list. This allows you to quickly identify the vehicle or trip that had a particular exception. The legend also has a convenient select/deselect all exceptions button.
- Emailed notification templates support embedded maps. Please use the token {map} in your template.
- Routine purging of HOS and DVIR data is available as a Feature Preview. Schedules are configurable to meet regulatory limits of HOS/DVIR data retention.
- The fuel fill-ups report includes driver information.
- Importing a database from MSAccess is no longer supported and must be done through a support request.

July 2015

- Telematic device health is monitored. Opt-in to the System Notice rule to receive troubleshooting alerts. (See [System Exceptions](#) for more details).
- The product feedback links, which are available when you edit a tooltip, now take you to a language appropriate feedback page.
- Emailed Reports option pages have been updated to clarify redirection etc. (See section [Emailed Reports](#) for more details).
- Zone highlighting has been changed.
 - Labels for zones which are grayed out are hidden to reduce clutter.
 - Highlight zones on this route is now cumulative, so that you can simultaneously highlight the zones from multiple routes.
 - Clicking on a previously highlighted zone now provides an option to turn the highlighting off.
- A fuel fill-up summary was added to the device page heading. This shows the average fuel economy, total volume and (if transactions are imported), the total cost for the time period selected.

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