



**RAND McNALLY**

# DriverConnect Portal Help

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## About DriverConnect



DriverConnect is an integrated platform that consists of the DriverConnect app installed on an Android™-based device (a tablet or a smartphone), a cloud-based web portal, and a Rand McNally ELD.

The ELD automatically gathers driving data and sends the data to an Android™ device or tablet over Bluetooth®. DriverConnect uses an internet connection (cellular or Wi-Fi™) from the Android™ device to store that data in a cloud-based online account. You can access this data through the DriverConnect portal.

The DriverConnect Portal:

- Automatically calculates drivers' Hours of Service (HOS).
- Displays work timers that tell you how long you have left in your driving session, shift, day, and work week.
- Displays break timers that calculate time left in your break, and how long until your work cycle restarts.
- Displays gauges with details about your engine's performance.
- Creates driving logs for Law Enforcement Officer (LEO) inspections.
- Allows messaging services between drivers and fleet managers.
- Stores more than 6 months of driving logs in the DriverConnect portal.
- Provides certifiable Driver-Vehicle Inspection Reports (DVIR).
- Automatically tracks your state-to-state driving for IFTA reporting.
- Allows you to take and store a photo of your fuel invoice.
- Provides forms-based workflows for completing common tasks.

## Terminology

These terms are used throughout this guide:

- **ELD** is short for Electronic Logging Device. An ELD connects directly to your truck and send information over Bluetooth® to your Android™ device or tablet. **Your ELD** refers to the specific Rand McNally ELD installed in your vehicle, such as the ELD 50 or DC 200 or DC 210.
- An **Android™ Device** means the Android™-based smartphone or tablet on which you have installed and use the DriverConnect app.
- **HOS** means your Hours of Service. This is the amount of time spent On Duty, Driving, in the Sleeper Berth, and Off Duty.
- A **DVIR** is a Driver-Vehicle Inspection Report. You need to complete one before and after each driving session.
- **IFTA** is the International Fuel Tax Agreement. DriverConnect automatically tracks your state-to-state driving for easier IFTA reporting.
- The **Fleet Manager** is the individual at your organization who typically interacts with drivers by managing logs and reports, performing dispatch, etc.
- The **DriverConnect app** is the Android™-based component of DriverConnect that allows drivers to log HOS, create DVIRs, and use built-in messaging functions to communicate with other members of the fleet.

## Important Note

This user manual includes instructions for all DriverConnect Portal functions. Images used in the following chapters are for example purposes only. Certain functions may not be applicable based on your subscription level.

## How Do I...?

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# Common Functions in the DriverConnect Portal

These questions provide a quick overview on how to do basic tasks in the DriverConnect portal.

**Note:** *Some functions may not be available, depending on your company's subscription level and your individual access level.*

### All Users

*How do I change my personal information, such as my name, email, or Driver ID?*

Click your name in the menu bar, and select Profile (page 126). Make the changes you need and click **Update**.

*How do I send messages?*

Click the **Messaging** tab in the menu bar.

On the Chats Tab (page 148), click a contact's name or **New Chat** to open a messaging window. Or, on the **Contacts** tab, click a contact's name to open a new message.

Type a message and click the **Send** button.

### ***How do I manage my contacts?***

Manage contacts from the Contacts Tab (page 151). Contacts are uploaded automatically and include all drivers and managers in your terminal or fleet. You can create group contacts, where you can send and receive messages from multiple people at once. Use the **Contacts** tab and click **Create New Group** to get started.

### ***How do I view my truck's location?***

When you open the Mapping page (page 15), the map defaults to showing the last recorded location of your truck. The map also shows breadcrumbs (which mark the path you have driven) for the truck's movements over a defined time period.

### ***How do I view my Hours of Service (HOS)?***

To view a snapshot of current HOS values, click **Compliance** in the menu bar, and select **Snapshot**. The Snapshot page (page 79) displays HOS information for the last 8 days.

You can also select Hours of Service (page 83) from the **Compliance** menu. Enter a date range and click **Search**. The results show an overview of the HOS for each day. Click a row of the results table to display a detailed report that shows your HOS in a graphical format.

### ***How do I view my driving events?***

Click **Analytics** in the menu bar, and select Events (page 119). The **Events** page displays all events, including driving events.

### ***How do I view a Driver-Vehicle Inspection Report (DVIR)?***

In the **Compliance** menu, select Vehicle Inspections (page 83). Enter a date range and click **Search**. Click the text in a returned record to display the report.

### ***How do I find information for IFTA reporting?***

**Note:** You must have a subscription to the Core plan to access these functions.

In the Fuel Taxes menu, you can access the select State Mileage (page 110), State Crossings (page 113), and Fuel Purchase (page 115) menu options. The State Mileage page displays miles driven per state. The State Crossings page shows when state lines were crossed by each vehicle. The Fuel Purchase page displays fuel purchases logged in the DriverConnect app.

You can use the information from these pages to complete your IFTA reporting.

### ***How do I format a report?***

In a report, you can apply Formatting (page 168), Show/Hide Columns (page 172), use column Sorting (page 175), and/or Apply a Column Filter (page 173). Click in a column to access the Advanced Options menu (page 167). Choose an option and apply the changes.

When you format a report and then export it, the formatting changes you make on the screen are also exported.

### ***How do I create a .PDF or Excel report?***

To Export a Report (page 166), look for the PDF and Excel icons in the upper right corner (   ). Click an icon to create an exported report.

**Note:** The report will display exactly what appears on your screen, including the date range and all formatting options selected.

## Terminal Managers

### ***How do I change my terminal information?***

Click your name in the menu bar, and select Terminal Info (page 138). Make the changes you need and click **Update**.

### ***How do I view my drivers?***

Click the **Management** link in the menu bar, then Users (page 42). Changes to user profiles must be made by the fleet manager.

### ***How do I view my drivers' driving events?***

Driving Events (page 119) are recorded duty status changes and unsafe driving conditions. Click **Analytics** in the menu bar and select Events. The **Events** page displays driving events.

### ***How do I view my vehicles?***

Click the **Management** link in the menu bar, then Tractors (page 55). This page displays all vehicle numbers recorded by drivers through the DriverConnect app.

### ***How do I view ELDs registered to my terminal?***

Click the **Management** link in the menu bar, then Devices (page 51).

### ***How do I use driver and vehicle groups?***

Use the [Groups](#) page (57) to add drivers or vehicles into a group for quick searches. Click **Management** in the menu bar and select Groups. Click **+ New Group** to create a new group or click on an existing group to edit. Select or deselect group members from the left column and click **Create** (or **Update**).

## Fleet Managers

### *How do I change my subscription?*

Click your name in the menu bar, and select [Subscription](#) (page 141). Click **Manage** to change your subscription level.

### *How do I add another ELD to my company?*

Click your name in the menu bar, and select [Subscription](#) (page 141). Click **Add Device** to enter additional ELD serial numbers and add them to your fleet.

You can view the ELDs already registered to your fleet by clicking the **Management** link in the menu bar, then [Devices](#) (page 51).

### *How do I send destinations/ stops to a driver?*

Use the Route function (Page 35) within the **Mapping link** to create multi-stop trips. You can then send a destination (or multiples) to a driver using the Messaging function.

### *How do I view my drivers' driving events?*

Driving Events (page 119) are recorded duty status changes and unsafe driving conditions. Click **Analytics** in the menu bar and select Events. The **Events** page displays driving events.

### ***How do I add a new driver or terminal manager?***

Click the **Management** link in the menu bar, then Users (page 42). Click **+ New User**.

You can select **Driver** or **Terminal Manager** in the **Select Role** dropdown.

### ***How do I view my vehicles?***

Click the **Management** link in the menu bar, then Tractors (page 55). This page includes all vehicles (Tractor numbers) recorded by drivers through the DriverConnect app. Click a vehicle to assign it to a new terminal.

### ***How do I manage my drivers and terminal managers?***

Click the **Management** link in the menu bar, and select Users (page 42). Make the changes you need and click **Update**.

You can also click the – in a user's row to delete that user.

### ***How do I assign a driver to a terminal?***

Click the **Management** link in the menu bar, and select Users (page 42). Select a new terminal from the **Terminal** dropdown. Click **Update**.

### ***How do I create and manage terminals?***

Click **Management** in the menu bar, and select Terminal (page 63). Click **+ Terminal** to create a new one.

You can manage your terminal by clicking the text in a row. Make the changes you need and click **Update**.

You can also click the – in a row to delete that terminal.

### ***How do I use driver and vehicle groups?***

Use the [Groups](#) page (57) to add drivers or vehicles into a group for quick searches. Click **Management** in the menu bar and select Groups. Click **+ New Group** to create a new group or click on an existing group to edit. Select or deselect group members from the left column and click **Create** (or **Update**).

### ***How do I create a new workflow?***

Click the **Management** link in the menu bar, and select Workflow (page 63). Click **+ Create New**.

### ***How do I edit a workflow?***

Click the **Management** link in the menu bar, and select Workflow (page 63). Click a row. In the **Action** dropdown menu, select **Edit**.

### ***How do I send a form to a driver?***

Click the **Messaging** tab in the menu bar, and click the Chats Tab (page 148). Click the paperclip icon, select **Form**, and choose a form to send from the dropdown menu.

### ***How do I send a workflow to a driver?***

Click the **Messaging** tab in the menu bar, and click the Workflow Tab (page 157). Click **+ New Workflow**. Select a driver and a workflow, enter completion times, and click **Send Workflow**.

***How do I view the status of a workflow?***

Click the **Messaging** tab in the menu bar, and click the Workflow Tab (page 157). The workflows in progress display, with statuses for each task and the workflow overall.

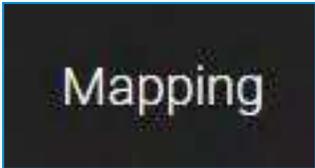
Click a workflow in progress to view information, including completed forms.

***How do I change my company information?***

Click your name in the menu bar, and select Company Info (page 131). Make the changes you need and click **Update**.

## User Dashboard

The **Mapping** page displays upon login. This is your dashboard and allows you to track the location and movement of your truck(s).



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## Mapping

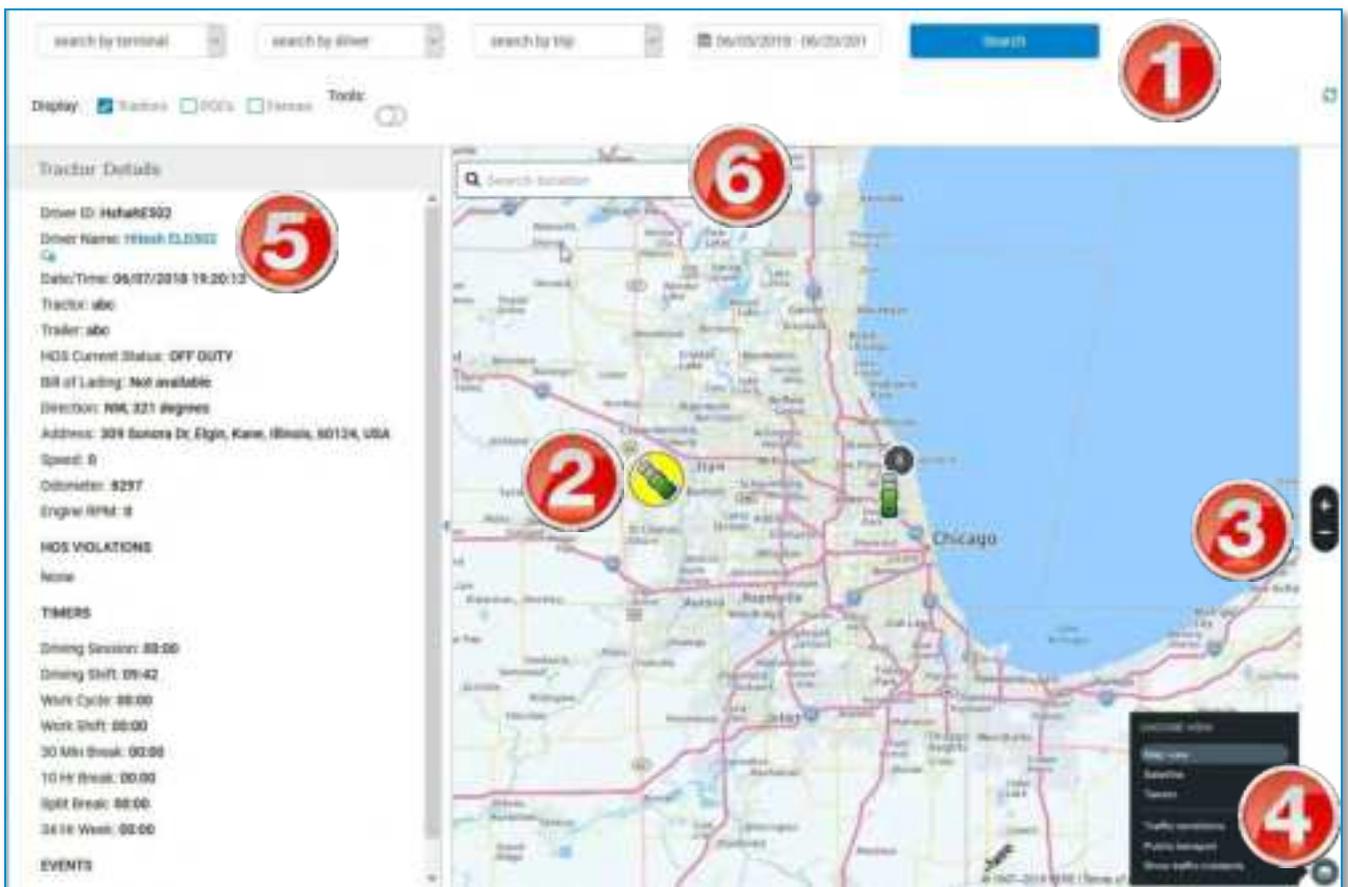
The **Mapping** page is the first page you see when you log in to DriverConnect. This page displays a map showing the most recent location of each vehicle registered to you.

When connected to the internet, the DriverConnect app sends location information to the portal. This includes the truck's current (most recent) location, previous locations, HOS timers, and events. See below for more information.

**If you are a Driver:** You will only see location information for the most recent truck you have used.

**If you are a Fleet Manager (FM):** You will see the location and GPS information of all trucks registered to your fleet. You can view the most recent locations for each vehicle (going back 15 days). Select a driver to access driving in 7-day increments.

**If you are a Terminal Manager (TM):** You will see location and GPS information of all trucks registered to your terminal. You can view the most recent locations for each vehicle (going back 15 days). Select a driver to access driving history in 7-day increments.



On the **Tractor Mapping** page, you can:

1. Select your filters from the dropdown menus and click **Search**. See how to use Search Filters (page 163). If you are a driver, only your information displays.
2. Click a truck or breadcrumb icon to view more information about the vehicle, including tractor and driver information, current HOS statuses and timers, and events.

Selected trucks are outlined in yellow. Previous vehicle positions, shown as arrowheads (called “breadcrumbs”), are also clickable.

*Information displays in the panel to the left of the map.*

3. Click the **+** and **-** buttons to zoom in and out on the map.

You can also click and drag to move the map and use the mouse wheel to zoom in and out.

4. Click the **Choose view** icon in the lower right for additional mapping options.
5. Click a driver's name to open a Messaging screen and compose a message to the driver.
6. Search for a location by typing in the single-line search field. See below for details.

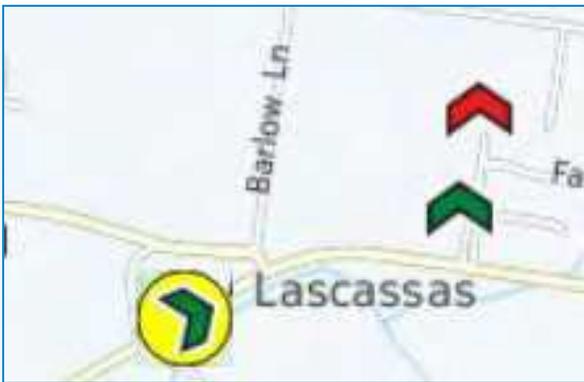
**Notes:**

- *The default view for fleet and terminal managers shows locations of all trucks for the previous 15 days.*
- *Selecting an option from one menu may disable another menu. For example, selecting a driver disables the **Tractors** dropdown.*
- *Depending on your subscription level, you can select from the following menus: Drivers, POIs, Fences, Assets, and Tractors.*

# Truck and Breadcrumb Icons and Information



A truck's current location is displayed by the truck icon. Previous locations display along the route as arrowheads called **breadcrumbs**. A line of breadcrumbs provides a snapshot of the route traveled by the truck. Breadcrumbs only display when viewing the map for an individual driver.



Normal breadcrumbs display in green. The selected breadcrumb displays with a yellow outline. Breadcrumbs in red indicate a violation or an event.

Click a truck or breadcrumb icon to view additional information about

the truck, including:

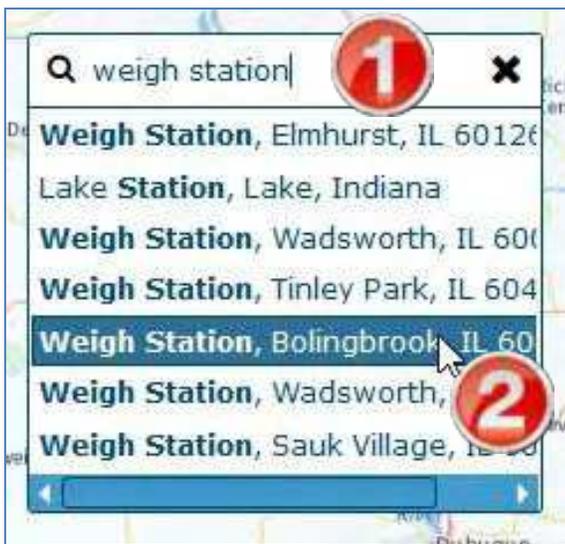
Driver ID, Tractor and Trailer numbers, date and time the truck was at that location, plus any HOS violations in effect at that location and (if available) the vehicle's speed, odometer reading, and engine RPM.

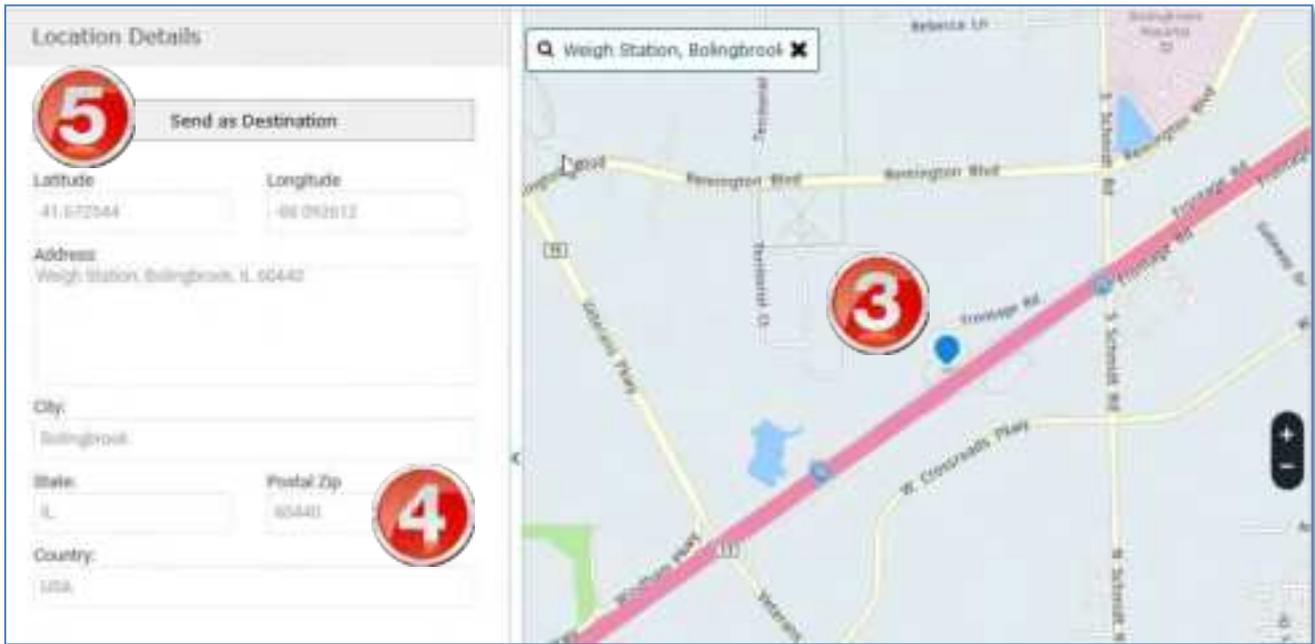
**Fleet and Terminal Managers:** When viewing all drivers, only the truck icons display showing the locations of each truck in your fleet. The truck icon and breadcrumbs display once you select an individual driver to view.

## Search Location

The search bar overlaying the map provides a single-line destination search. You can use this search bar to search for destinations by keyword. Keywords can be a company name, street address, city center, etc.

As you type, the closest matching possibilities display. If you do not immediately see the destination you are searching for, enter more information until it displays.





To search for a destination:

1. Begin typing in the search bar.  
*A list of matching locations displays.*
2. Click the location you want to display.
3. The location displays on the map.
4. Details about the location display to the left.
5. Click **Send as Destination** to send the location to a driver as a navigable destination. See page 40.

# Mapping Tools



On the **Mapping** page, you can choose to display tractors, points of interest, and geofences. You can also access tools to draw fences and place POIs. The **Display** checkboxes allow you to show or hide tractors, POIs, geofences, and assets on the map. The **Tools** slider shows options for additional mapping tools.

1. Select a checkbox to display an option on the map; de-select the checkbox to hide the option.

*When you select a checkbox, the map will display all available icons for that type in the display area. You may need to zoom in or scroll on the map to see additional icons.*

2. Select the **Tools** slider to display the **Place POI**, **Draw Fence**, **Generate Report**, **Find Nearest**, and **Route** tools.
3. Click the **Refresh** button to re-display the map.

On the map, tractors display as truck icons, POIs as orange markers, fences as shaded areas, and assets as blue icons. Selected icons display with a yellow circle:



## Place POI

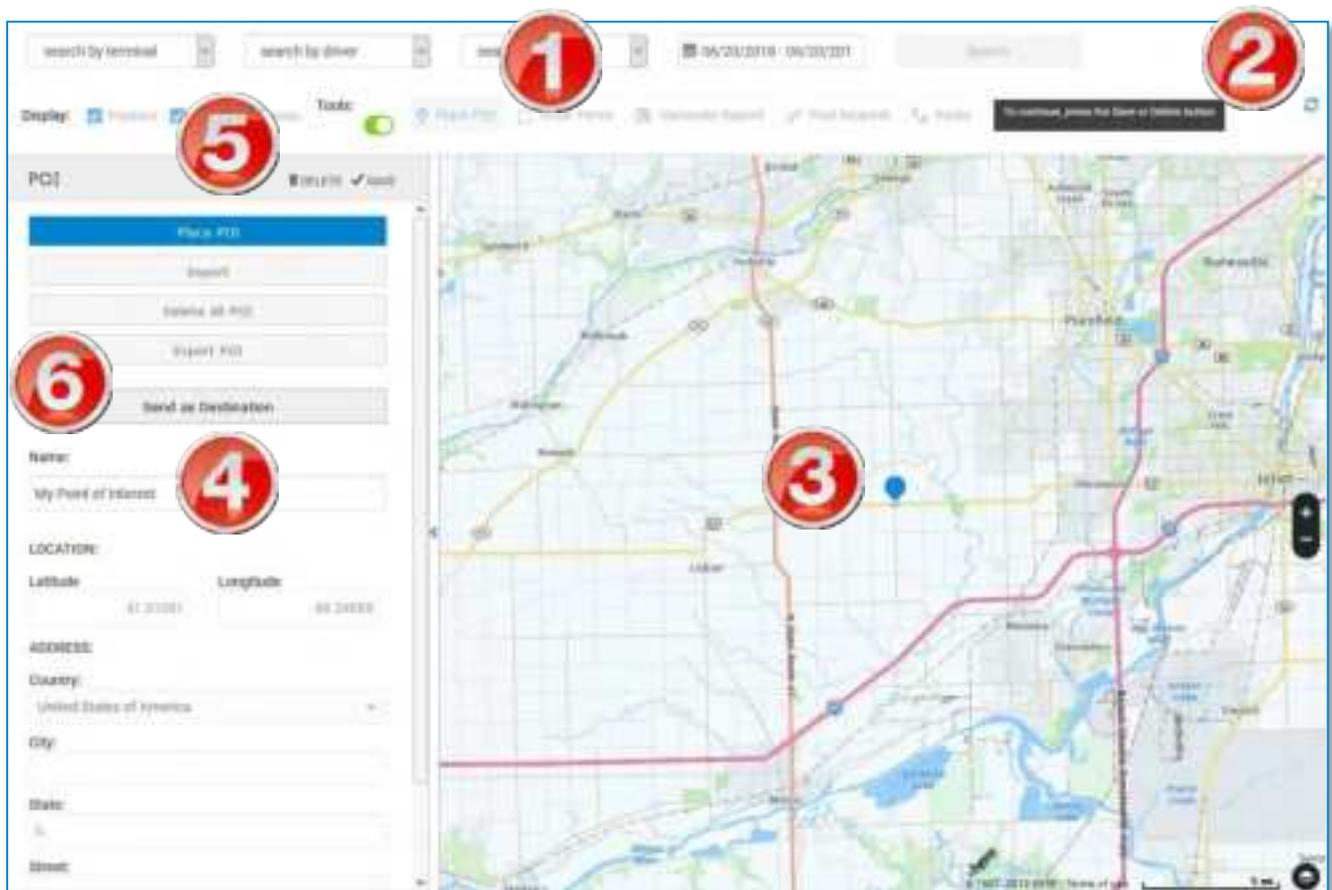
The **Place POI** functions allows you to add your own Points of Interests to the map. Points of Interest (POIs) are designated spots that may be valuable to your fleet. These can include any other location of interest to your drivers, such as rest stops, restaurants, weigh stations, etc. You can either place them manually or import POIs onto the map.

You can view your drivers' current position and breadcrumb path on the **Mapping** page to see when they are approaching a POI. You can communicate the upcoming POI to the driver with the messaging functions in the Chats Tab.

POIs can be placed manually, or you can import a .csv file with pre-defined POIs.

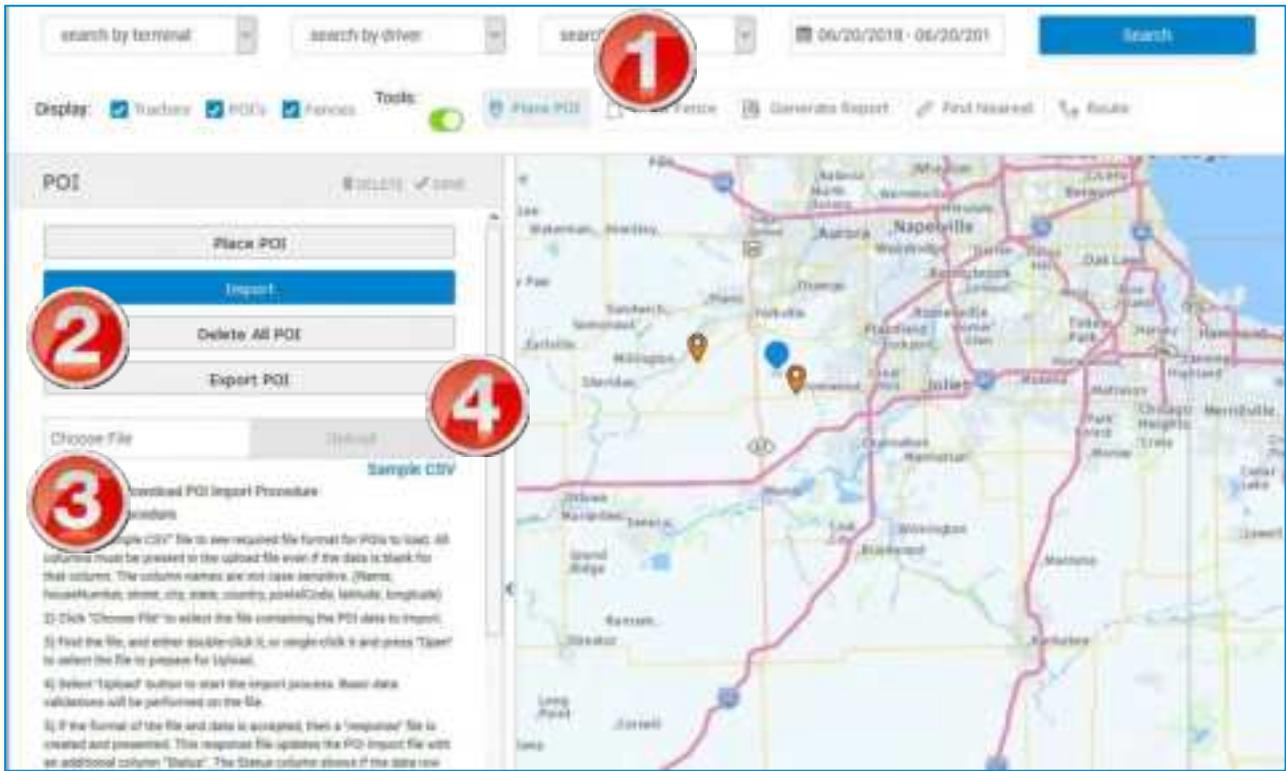
You can also export a .csv file with a list of your POIs.

## Place a POI Manually



1. Click **Place POI** in the **Tools** section of the **Mapping** page.
2. As-you-go instructions display in the upper right corner of the map page.
3. Right-click on the map to place a POI. You can also left-click and drag the POI to move it to a new location.
4. Type a name for the POI and verify its location.
5. Click **Save** to save the POI. Or, click **Delete** to delete this POI and start again.
6. Click **Send as Destination** to send the location to a driver as a navigable destination. See page 40.

## Import/ Export a list of POI s



1. Click **Place POI** in the **Tools** section of the **Mapping** page.
2. Select **Import** in the **Select POI Placement** drop-down menu.  
Click **Export POI** to export a list of your POIs to a .csv file.
3. Click **Choose File** to select the .csv file to import from your computer.
4. Click **Upload** once you have selected the file.

**Note:** Click the **Sample CSV** link to view an example file, which shows how the file needs to be formatted.

## Edit or delete a POI

**Note:** You can only edit the name of a POI after you save it. To change the address or coordinates, you need to delete the POI and create a new one instead.



1. In the **Tools** section, click **Place POI**.

2. Click the POI you want to edit or delete.

*The selected POI displays in yellow, and the **POI** pane displays on the left side of the map. Other POIs display normally.*

3. Type a new name.

4. Click **Save** to save the POI. Or, click **Delete** to delete the POI.

## Draw Fence

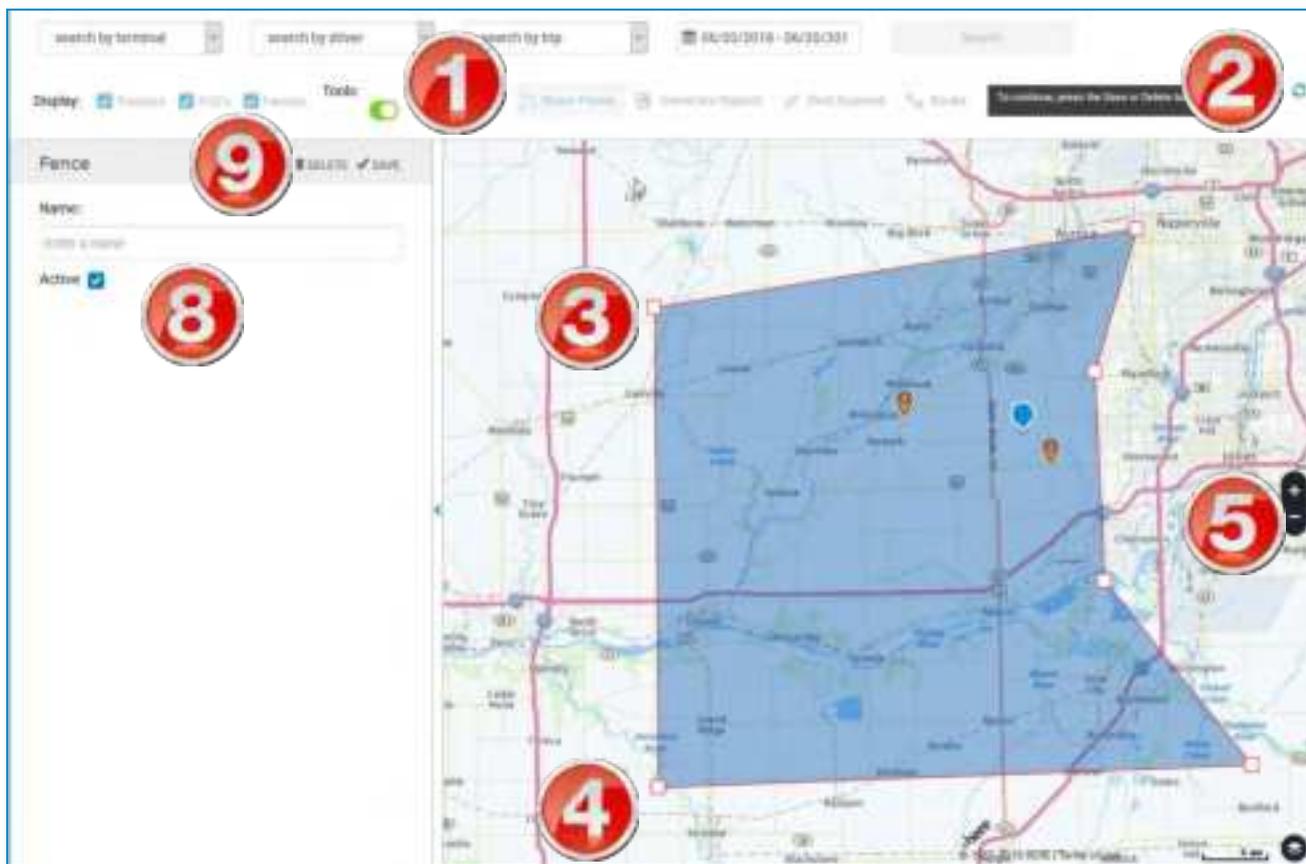
Geofences (or “fences”) are areas that you can define on the map that set boundaries for your drivers. On your **Company Information** page, you can set up email alerts when a driver crosses a fence. As the driver’s ELD sends location information, the DriverConnect system compares the location reported by the ELD to the coordinates you define for a fence. This is useful for tracking activity in and out of certain areas.

You can use fences for these and other applications:

- Set up a fence around a city to be notified when your drivers enter in and out of the city’s metro area.
- Draw a fence around an important customer’s location.
- Draw a fence around an area you would like drivers to avoid.

After creating a fence, you can activate or de-activate it at any time.

## Draw a fence



1. Click **Draw Fence** in the **Tools** section of the **Mapping** page.
2. As-you-go instructions display in the upper right corner of the map page.
3. Right-click on the map to place your first fence post.
4. Right-click again to place the next post.  
Continue right-clicking on the map to place as many posts as you need for your map.
5. Click the **+** and **-** buttons to zoom in and out for greater accuracy.
6. When you are finished placing posts, double-right-click to stop.

## DriverConnect Portal Help

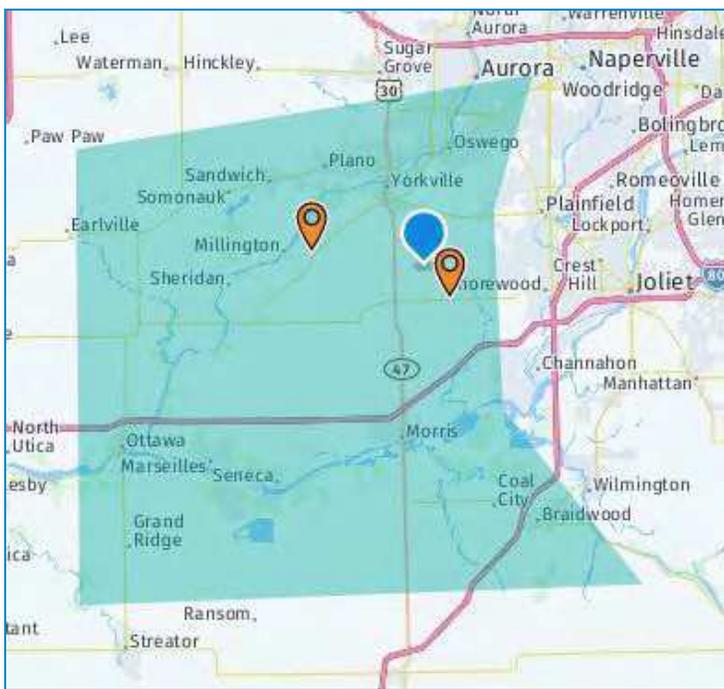
7. After your fence posts are set, click (left) and drag a fence post to change its location. You can also drag the whole fence by clicking inside the fence and dragging it.

*You cannot change a fence post location or drag the fence after you save the fence.*

8. Type a name for the fence and select the **Active** checkbox.
9. Click **Save** to save the fence. Or, click **Delete** to delete the fence and start again.

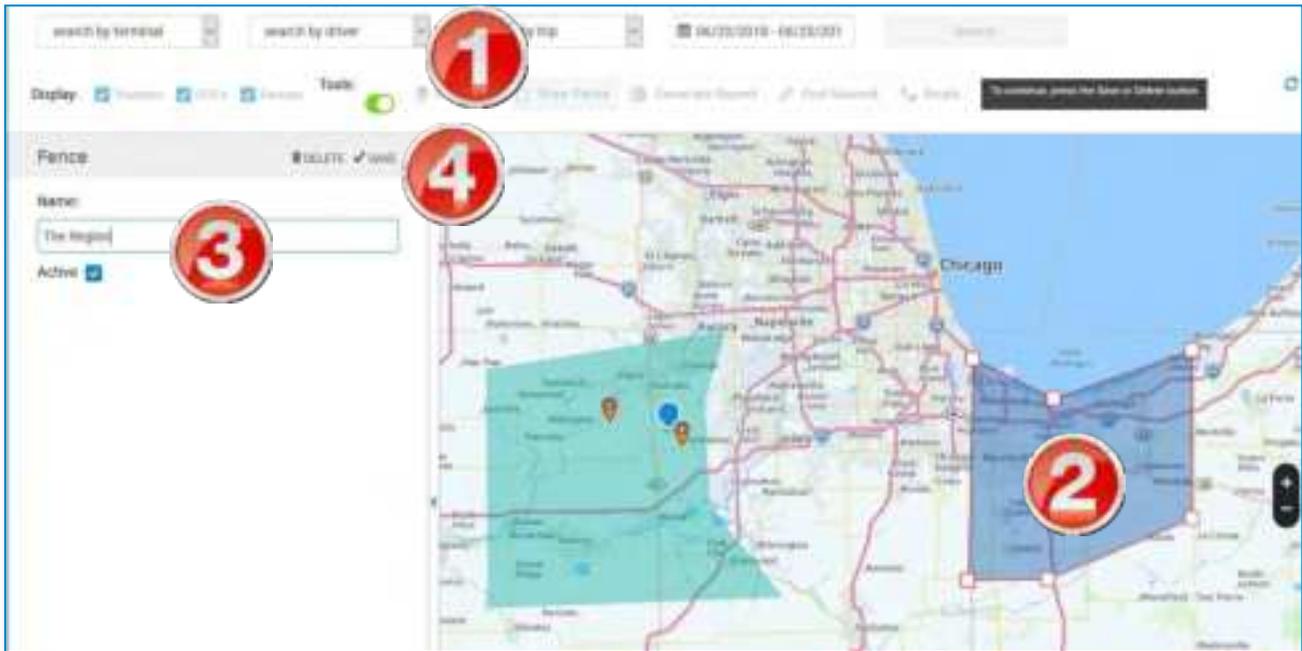
*The **Fences** checkbox must be clicked to see the saved fence on the map.*

Saved fences display as shaded green areas on the map:



## Edit or delete a fence

**Note:** You can only edit the name and active status of a fence. You cannot add, change fence posts once you save a fence. To change posts, you need to delete and re-draw the fence.



1. In the **Tools** section, click **Draw Fence**.

2. Click the fence area you want to edit.

*The selected fence is outlined in red, and the **Fence** pane displays on the left side of the map.*

3. Type a new name or select/de-select the **Active** checkbox.

4. Click **Save** to save the fence. Or, click **Delete** to delete the fence.

# Generate Report

Reports show information about all of the drivers, tractors, and assets located within the visible map area. The report displays the following information for each driver:

- Driver Name and ID
- Date and Time of the last recorded portal event
- Tractor and Trailer Numbers
- Driving direction
- Most recent recorded event
- Last address recorded
- Speed, Odometer, and Engine RPM recordings



1. Using the zoom buttons on the map and the mouse to move the frame, adjust the map to show the report area.
2. Click **Generate Report** in the **Tools** section of the **Mapping** page  
*The report displays in a window to the left of the map.*

3. Use the up/down and left/right scroll bars in the report sub-window to view all rows and columns. Use the next/previous page arrows to view different pages of the report.
4. Click on a row in the results table to center the map on and highlight the associated icon.

## Find Nearest

The “Find Nearest” function shows you the location of the closest tractors, POIs, fences, and assets, in order, to a point within a radius that you specify. It also shows updated information about each tractor, POI, fence, or asset.



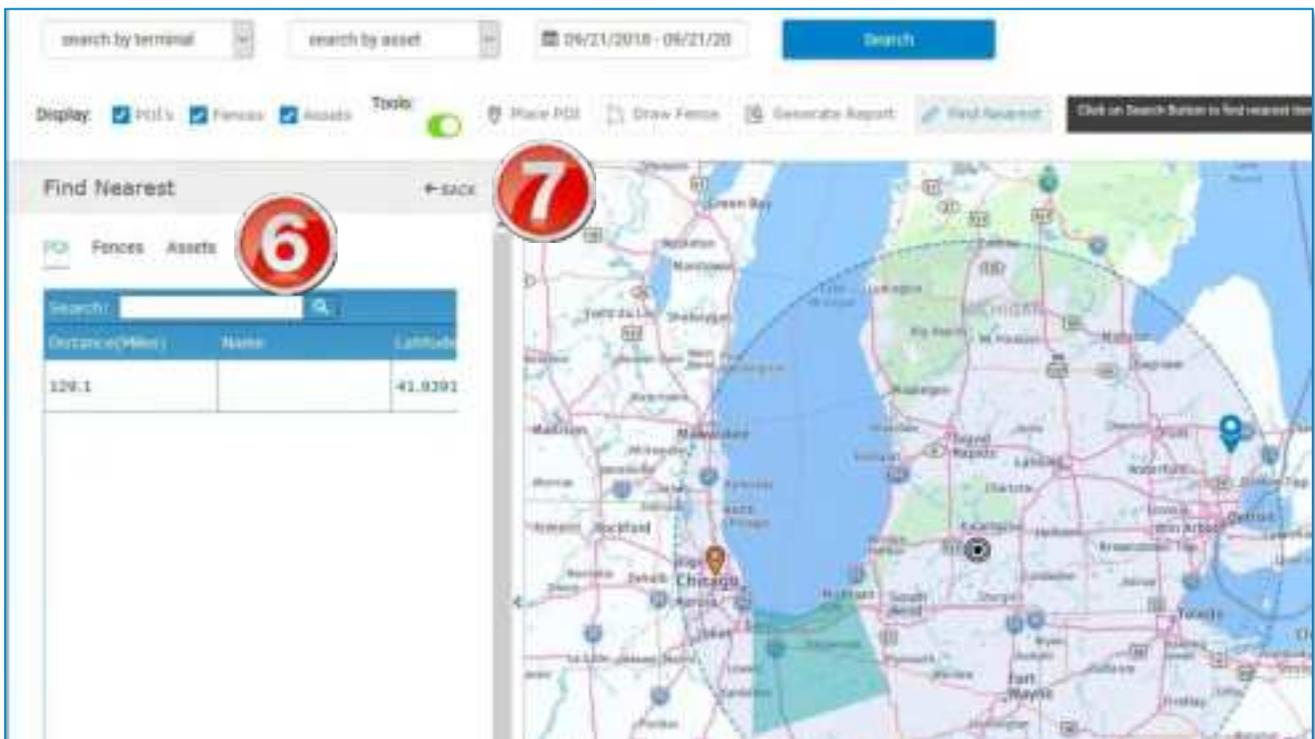
1. Click **Find Nearest** in the **Tools** section of the **Mapping** page.
2. Right-click a point on the map to set as the mid-point of your search area.

*A circle displays on the map, with a radius (in miles) as set in the slider on the left.*

3. Using the sliders to the left, set the radius (in miles) of the search area, and set the number of items nearest to your location to display.
4. Click **Reset** to restore the default values and remove the center point.
5. Click **Search**.

*The nearest Tractors, POIs, Fences, and Assets to your location display in the left-side bar.*

6. Click a header (*Tractors, POIs, Fences, or Assets*) to change views.
7. Click **Back** to conduct a new search.



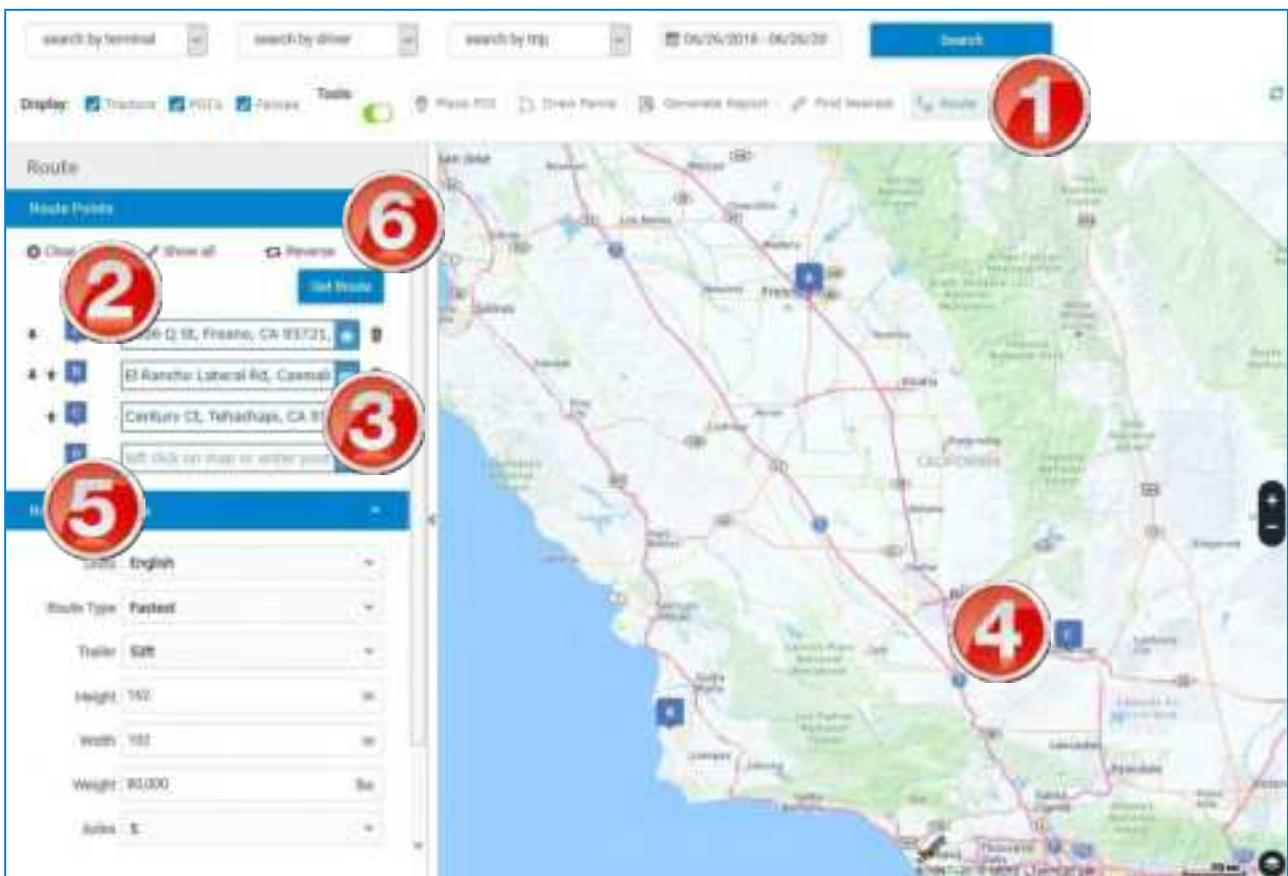
**Note:** *You cannot manually edit the latitude and longitude values. You must select a new point by right-clicking the map.*

# Route

The Route functions allow you to:

- Set vehicle preferences (such as height, Hazmat type, etc.) to create truck-safe routes
- Create routes with up to 10 destinations
- Reorder routes
- Calculate tolls in advance
- Generate turn-by-turn directions for each leg of the trip.
- Send single- or multi-stop trips to a driver

## Create a Route



1. Click **Route** in the **Tools** section of the **Mapping** page.

2. In the **Route Points** section, begin by clicking in the text box for Stop A.
3. Begin typing in the search box to use the single-line destination search. Select the matching address form the search results.
4. Alternatively, you can click in the search box, then immediately left click a point on the map to automatically enter the address of the point you click.
5. After selecting a destination, an additional search box displays. Repeat steps 3 and 4 to add up to 10 destinations.
6. Click **Get Route** to generate turn-by-turn directions that comply with your route preferences.

## Edit a Route



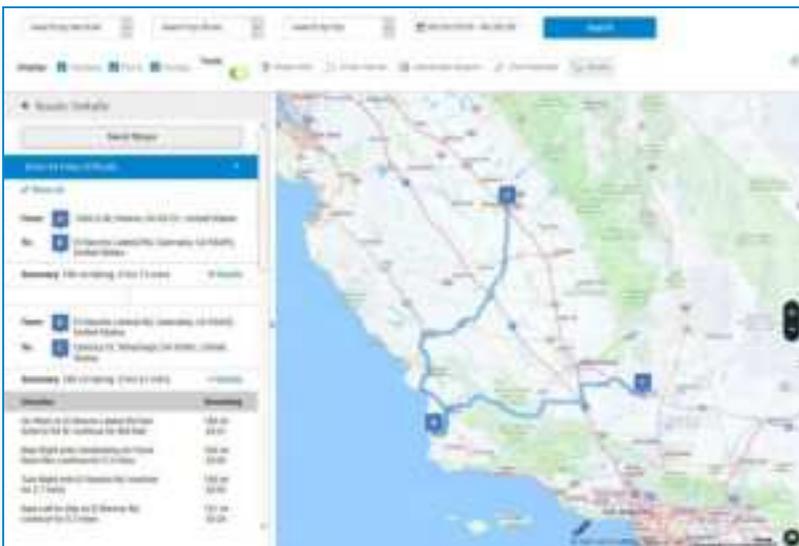
**To edit your route, click:**

1. **Clear all** to delete all entered destinations.
2. **Show all** to zoom the map out to display all destinations in one view.
3. **Reverse** to reverse the order of all stops (the last stop will become the first stop, and so on).
4. The up arrow next to a destination to move it ahead in order
5. The down arrow to move it behind in order
6. The trash can icon to delete a destination
7. The white arrow to minimize the **Route Points** view.

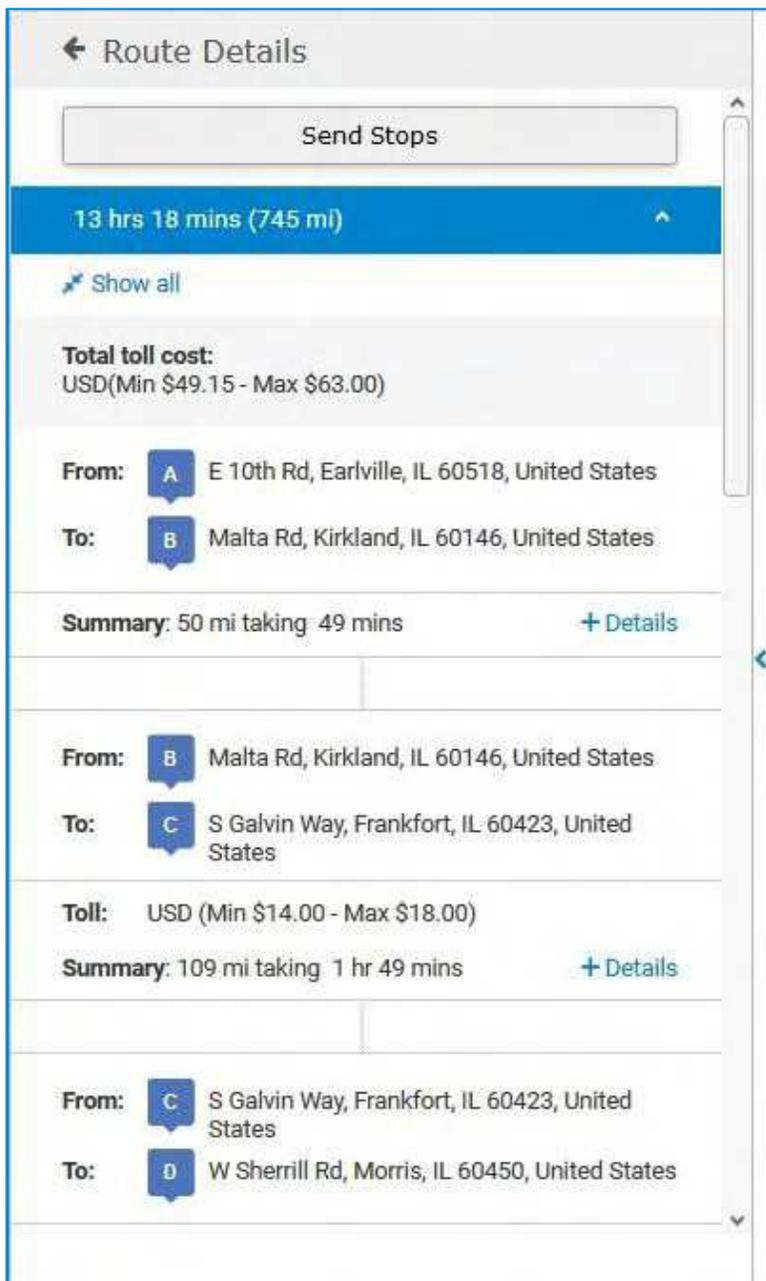
**View Route Details**

After you click **Get Route**, the Route Details view displays, showing:

- A summary of the total mileage and estimated time for the trip
- Toll costs (or estimated cost ranges)
- Detailed turn-by-turn directions for each destination
- Mileage and time estimates for each step in the route, if applicable
- A map showing truck route connecting the destinations in order



## In the Route Details view :



Each individual leg is broken out into different trips, with individual mileage and time calculations.

1. Click **Show all** to display the entire route on the map.
2. Click **+ Details** to view the turn by turn directions for each leg. Click **-Details** to collapse the directions.
3. Click **Send Stops** to send the stop(s) to a driver. See page 40.
4. If the route contains tolls, the estimated toll costs display above the directions. A range of costs are typically provided to account for transponder discounts.

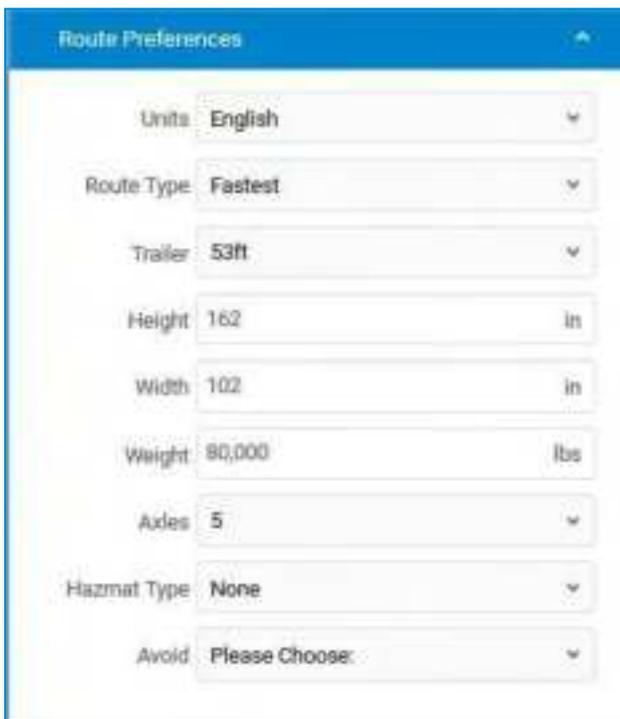
5. Use the scroll bar to scroll down and view additional stop details.

## Set Route Preferences

Setting Route Preferences can ensure that the route generated is compatible with your vehicle(s). The routing tool will filter out roads that do not meet criteria you set. For example, if your truck is 162 inches tall, you can enter that height to get a route that your truck will be able to pass through safely.

Preferences enable you to:

- Set your truck's dimensions (width, height, weight)
- Select the number of axles and type of trailer
- Choose a Hazmat type
- Choose road features to avoid, such as tunnels, ferries, tolls, etc.



### To set route preferences:

1. In the text field of any preference, enter or select a new value.
2. In the **Avoid** drop-down, you can select multiple entries.

*The route you generate after setting preferences will comply with the restrictions you define.*

**Note:** in the **Route Type** drop-down, selecting **Fastest** will generate a route that will take the

least amount of time based on your other selections. Selecting **Shortest** will generate a route that covers the fewest number of miles. These two routes are often not the same.

## Send a Destination (Stop) to Driver

The different Mapping tools provide several ways to send destinations, including multi-stop trips, to drivers or groups by using the DriverConnect messaging functions. In the portal, you can generate destinations, create routes, and send destinations to drivers.

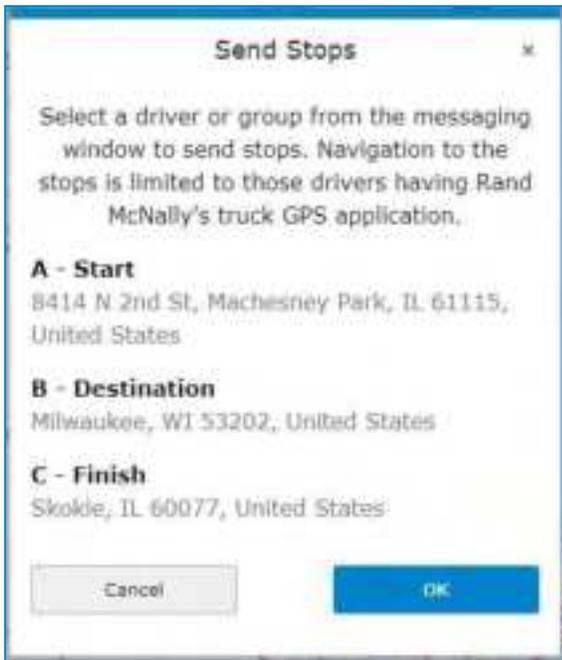
Drivers can then navigate to the destination you send them by tapping on the message in the DriverConnect app. Rand McNally's Truck GPS app will open and automatically configure itself to navigate to the destination.



1. Click **Send as Destination** to send the location to a driver as a navigable destination. See page 40.
2. Click **OK**.
3. The destination displays in a message to the driver or group in the DriverConnect app.

The same process applies to multi-stop trips. You can send up to 10 stops. The **Send Stops** window displays the starting destination

(**Start**), additional destinations (**Destination**), and the final destination (**Finish**).



The Messaging function displays the final destination in the message, but still contains all stops.

## Management Menu

The **Management** menu provides options for Fleet and Terminal Managers to manage drivers and portal users, terminals, and ELDs.



---

## Users

On the **Users** page, you can view, edit, create, and delete user profiles. The default view shows all users in your organization.

**Terminal Managers:** The **Users** page is read-only. You cannot create, edit, or delete users.

Each driver in your fleet needs a user profile. Drivers use a unique Driver ID to log in to the DriverConnect app. As you add new drivers, you need to create their Driver IDs and passwords. Drivers can change these later.

Each Terminal Manager also needs a user profile. Terminal Managers do not have Driver IDs, and do not use the DriverConnect app. Instead, they are able to manage a select group of drivers within their own terminal. See the **Terminals** page for more information.

Drivers and Terminal Managers can also be activated and deactivated and deleted. Deactivated drivers are unable to log in to DriverConnect. However, all of the user's data will remain in the system. Deleting a user also deletes the user's data.



**To search for users:**

1. Begin typing information about the user into the search box. You can type information from any column.

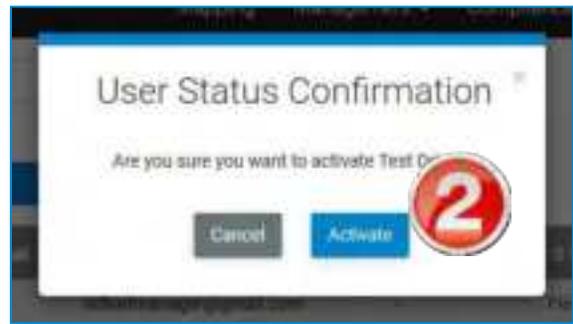
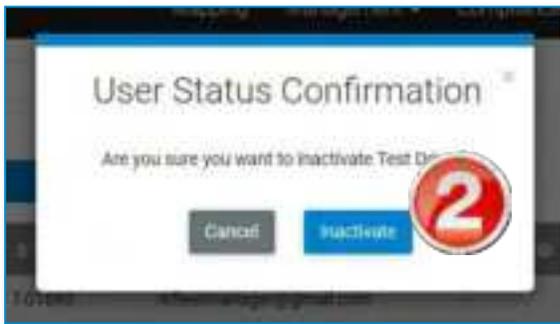
*As you type, information that matches your search terms automatically displays in the table.*

2. Click **Search** to display all users.
3. Click the arrows next to a column header to sort the information in ascending or descending order on that column.
4. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

**To manage users:**

5. Click **+ New User** to create a new user or **Add multiple users** to add more than one. See instructions below.
6. Click the text in a user’s row to edit the user. See instructions below.
7. Click the – sign to delete a user or check the box (☑) to activate or deactivate a user. See instructions below.

**To activate and deactivate a user:**



1. Click the checkbox to activate or deactivate.
2. Click **Inactivate** or **Activate** on the **User Status Confirmation** screen.

*The User page displays again.*

## Create a New User

**Add New User**

**PROFILE INFO**

First Name: First Name

Last Name: Last Name

Role: Driver

Driver ID: Driver ID

Email: Email

Shipping Document Number: F0034411707

Password: Password

Confirm Password: Password

Company: RM-07706 (test)

Terminal: T-04176 (test)

**PERMISSIONS**

Personal Conveyance:

Yard Moves:

User Exempt:

**DRIVER'S LICENSE INFO**

Name on License: Name on License

License Number: License No.

Licensing State: Issuing State

Cancel Create

The **New Driver** page is shown to the left, and the **New Terminal Manager** page to the right:

1. On the Users page, click **+ New User**.

**Add New User**

**PROFILE INFO**

First Name: First Name

Last Name: Last Name

Role: Terminal Manager

Email: Email

Password: Password

Confirm Password: Password

Company: RM-07952 (Field Testing)

Terminal: AS selected (2)

Cancel Create

The **Add New User** window displays.

2. Enter the information for the user. All fields are required.

Select the user role. You can select Driver or Terminal Manager:

3. **Driver:** Enter a Driver ID for the user. The driver will need the Company Code, Driver ID, and Password you create to log in to the DriverConnect app.

4. **Terminal Manager:** Select a terminal for the Terminal Manager (TM). If you have not yet created a terminal, the only option will be your organization's base terminal. You can create and edit terminals from the **Terminals** page.

*Optional: You can set the terminal manager's email notification options (see below in **Edit a Fleet or Terminal Manager**) after you create the user profile. By default, the TM will not receive notifications. See page 49.*

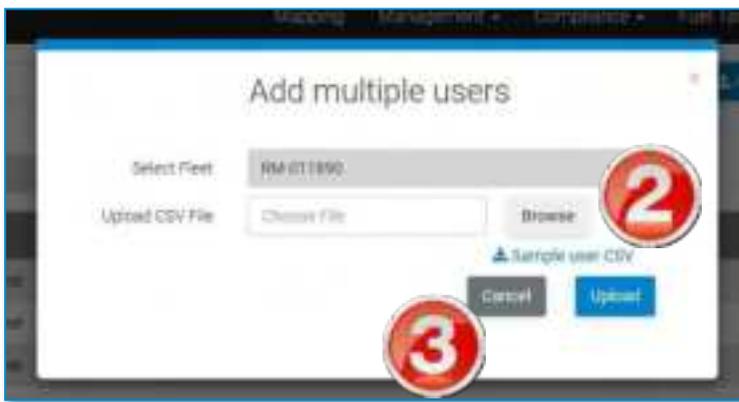
**Driver:** Select the **Permissions** sliders to grant specific permissions to the driver. These functions will only be available to the driver if they are enabled (green) in the user profile.

*Optional: You can also enter the driver's license information. This will be visible to the driver in the DriverConnect app.*

5. Click **Create** to create the new user or **Cancel** to close this page without creating a new user.

## Add Multiple Users

You can add multiple users at once by uploading a CSV spreadsheet containing the users' data.



1. Click **Add multiple users** on the **Users** page.
2. Click **Browse** to locate your users file.

You can click the **Sample User CSV** link to download a sample CSV file containing the proper formatting for data import.

3. Click **Upload** to upload the information to the database or **Cancel** to close this window without saving changes.

## Edit a Driver

You can change an existing driver's first name, last name, email address, and terminal assignment. You can also update the driver's license information.

**Note:** Updates made to a driver's account on the portal also display in the app.

1. On the **Users** page, click the text in a row to edit the driver.

The **Edit User** window displays.

2. Make changes to the driver's profile.

Fields in dark gray cannot be edited.

3. Click **Save** to save the changes or **Cancel** to close this window without saving changes.

The screenshot shows the 'Edit User' window with the following fields:

- First Name: Driver
- Last Name: Testaccount
- Driver ID: TA1234 (dark gray)
- Role: Driver (dark gray)
- Company: RM-0177 (RK Transport) (dark gray)
- Terminal: T-0151 (RK Transport)
- Email: email@address.co (highlighted with a red circle '2')
- HOS Rule Set: US 8 days/70 hours (Interstate) (dark gray)
- Name on License: Driver testaccount
- License No.: 123456789 (dark gray)
- Issuing State: Illinois

At the bottom, there are three buttons: a red circle with the number '3' (highlighted), a gray 'Cancel' button, and a blue 'Save' button.

## Edit a Fleet or Terminal Manager

You can change an existing fleet/terminal manager's first name, last name, email address, and terminal assignment. You can also set email notifications for the fleet/terminal manager.

**Edit User**

**PROFILE INFO**

First Name: Fleet

Last Name: Manager

Role: Fleet Manager

Driver ID: Driver ID

Company: RM-07956 (Skokie Asset)

Email: fm1@skokieasset.com

**Email Notification**

Get notified for: Daily summary, Every time events occurs

| Get notified for        | Daily summary            | Every time events occurs            |
|-------------------------|--------------------------|-------------------------------------|
| Over Idling             | <input type="checkbox"/> | <input type="checkbox"/>            |
| Tractor Geofence        | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Speeding                | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Hard Braking            | <input type="checkbox"/> | <input type="checkbox"/>            |
| Over Posted Speed Limit | <input type="checkbox"/> | <input type="checkbox"/>            |
| DVIR Defects            | <input type="checkbox"/> | <input type="checkbox"/>            |
| HoS Violations          | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Battery Low             | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Asset Tracker Geofence  | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Cancel Save

1. On the **Users** page, click the text in a row to edit the fleet or terminal manager.

*The **Edit User** window displays.*

2. Make changes to the fleet or terminal manager's profile.

*Fields in dark gray cannot be edited.*

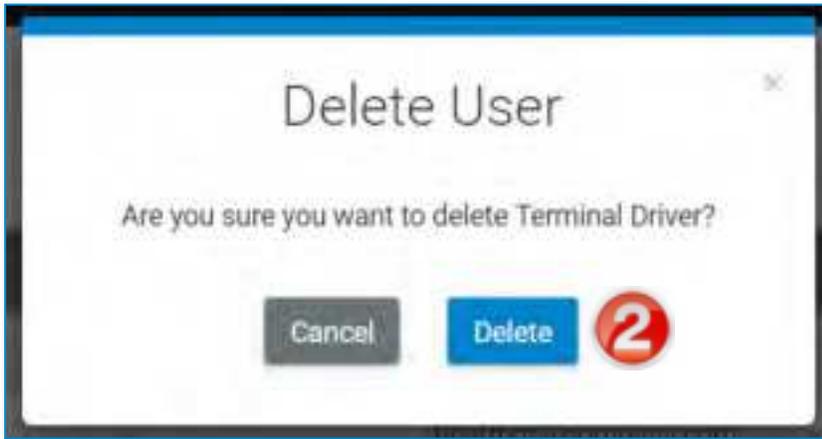
3. Set the **Email Notifications** slider to ON (green) to enable notifications for the terminal manager.

Set the slider to OFF (gray) to disable all email notifications.

4. Select the checkboxes for the events and notification types you want the terminal manager to receive.

5. Click **Save** to save the changes or **Cancel** to close this window without saving changes.

## Delete a User

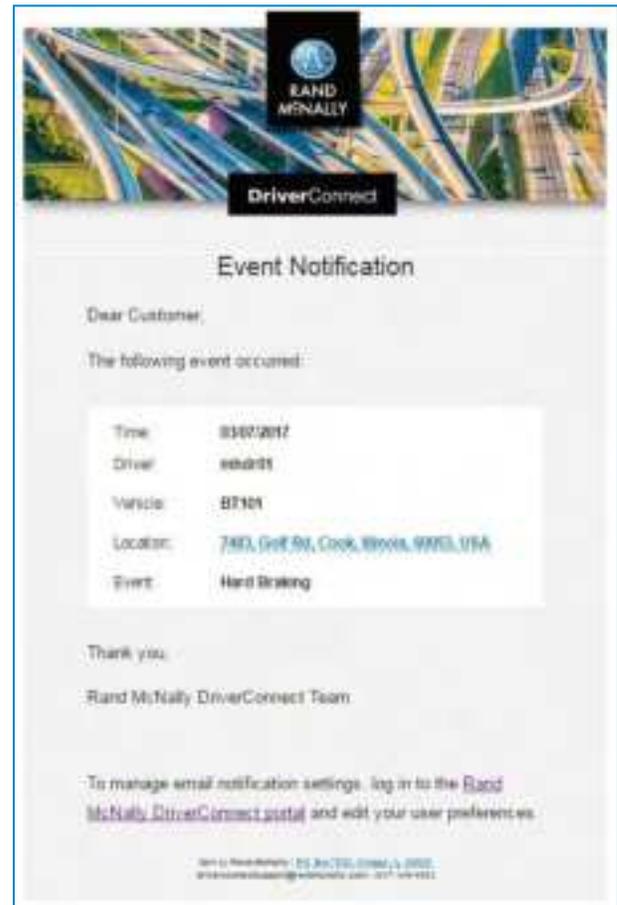


1. On the **Users** page, click the Delete icon (🗑️).
2. On the **Delete User** window, click **Delete** to delete the user. Click **Cancel** to cancel the delete process and leave the user profile intact.

## View Email Event Notifications

Email notifications are messages sent to fleet and terminal managers for specific driving events (such as speeding, hard braking, etc.). These emails can be sent individually for each occurrence, sent as a daily summary, both, or not sent at all. Each event can have different email settings.

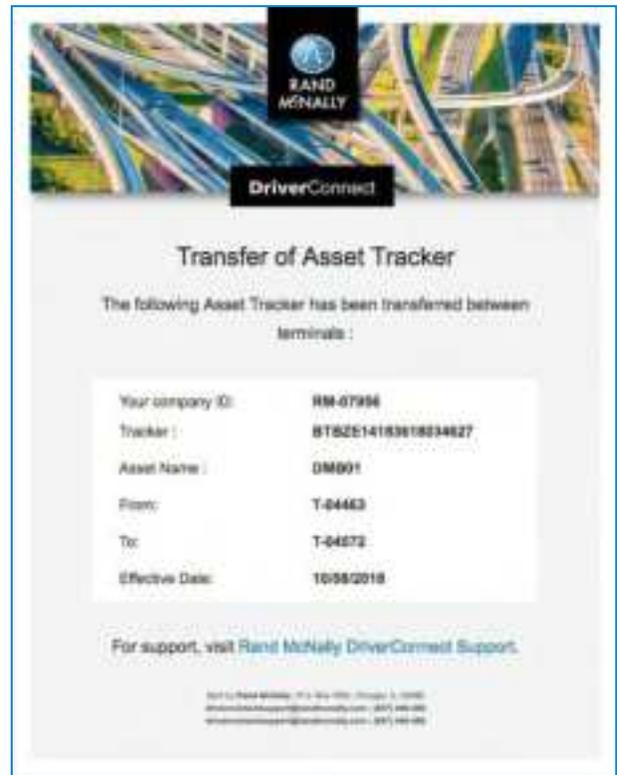
Notifications are also sent when transferring a driver, tractor, or



## DriverConnect Portal Help

asset from one terminal to another. These notifications occur automatically. You cannot turn off terminal transfer notifications.

**Note:** Geofence notifications are sent for tractors or assets both leaving and entering the fence area.



The screenshot shows a notification from DriverConnect. At the top, there is a header with the Rand McNally logo and the text 'DriverConnect'. Below this, the title 'Transfer of Asset Tracker' is displayed. The main message states: 'The following Asset Tracker has been transferred between terminals:'. A table follows, listing the transfer details:

|                  |                     |
|------------------|---------------------|
| Your company ID: | RM-07956            |
| Tracker :        | 8T82E14183618034827 |
| Asset Name :     | DM601               |
| From:            | T-04463             |
| To:              | T-04672             |
| Effective Date:  | 10/08/2018          |

Below the table, it says 'For support, visit [Rand McNally DriverConnect Support](#).' At the bottom, there is a small footer with contact information: 'Call us at 1-800-888-8888, 9:00 AM - 5:00 PM, Monday - Friday, 9:00 AM - 5:00 PM, Saturday, 9:00 AM - 5:00 PM. Email us at [driverconnectsupport@randmcnally.com](mailto:driverconnectsupport@randmcnally.com), 24/7, 9:00 AM - 5:00 PM. Visit us at [www.randmcnally.com](http://www.randmcnally.com), 24/7, 9:00 AM - 5:00 PM.'

# Devices

On the **Devices** page, you can all of the Electronic Logging Devices (ELDs) registered to your fleet or your terminal.

Any driver in your fleet can use any ELD. Drivers must pair their Android™ device with an ELD before using it. Instructions for device pairing can be found in the DriverConnect app user guide. Each ELD is listed with the most recent driver to use it. The ELD serial number, type, and MAC address also display.

## To search for devices:

Devices

Search

| First Name | Last Name | Driver ID | Device Type | Device S/N        | Firmware Version | App Version   |
|------------|-----------|-----------|-------------|-------------------|------------------|---------------|
| Driver     | Name      | DriverID  | DC 200S     | 0222P101726290220 | 0.1.11           | Not available |
| Driver     | Name      | DriverID  | ELD 50      | E50N.101621002532 | 0.0.52           | Not available |
| Driver     | Name      | DriverID  | DC 200      | 0252P101705000520 | 0.0.32           | 4.9.1 - 10421 |
| Driver     | Name      | DriverID  | DC 200      | 0252P101707000581 | 0.1.11           | 4.9 - 10804   |
| Driver     | Name      | DriverID  | ELD 50      | E50N.P11723000253 | 0.1.7            | 1.6.1 - 179_1 |

Showing 61 to 65 of 65 entries

First: 1 2 3 4 5 6 7 Last

1. Begin typing information about the device into the search box. You can type information from any column.

*As you type, information that matches your search terms automatically displays in the table.*

2. Click **Search** to display all devices.
3. Click the arrows next to a column header to sort the information in ascending or descending order on that column.

4. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

# Asset Trackers

On the **Asset Trackers** page, you can view and edit information about all asset trackers in your fleet or terminal.

**To search for asset trackers:**



1. Begin typing information about the device into the search box. You can type information from any column.

*As you type, information that matches your search terms automatically displays in the table.*

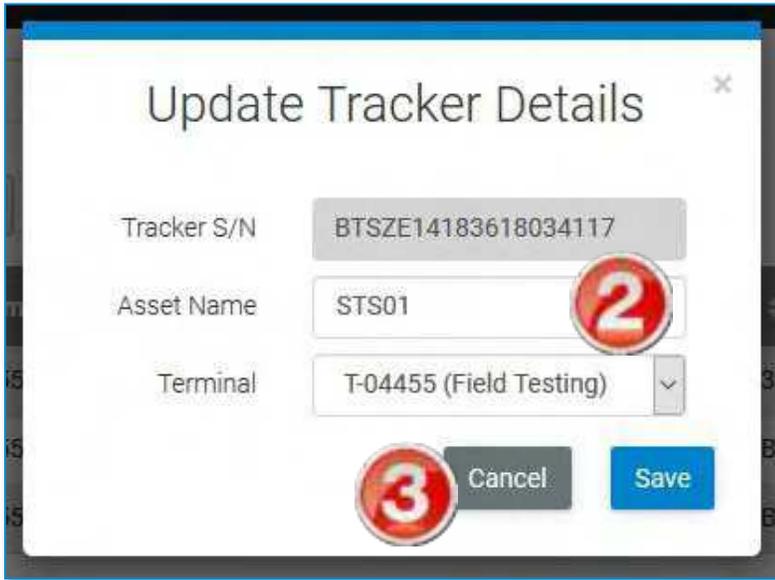
2. Click **Search** to display all devices.

3. Click the arrows next to a column header to sort the information in ascending or descending order on that column.

4. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

## Edit a Tracker

You can change the name and terminal assignment of your asset trackers.



1. On the **Asset Trackers** page, click the text in a row to edit the tracker.

*The **Update Tracker Details** window displays.*

2. Make changes asset name and/or terminal assignment.

*Fields in dark gray cannot be edited.*

3. Click **Save** to save the changes or **Cancel** to close this window without saving changes.

# Tractors

The **Tractors** page displays a list of all tractors identified from the DriverConnect app. Tractors are added automatically when drivers add the tractor number on the app's **Trip Info** page.

Fleet Managers can manage their fleet's tractor list and assign an ELD to a tractor when the **Portal Side Tractor Management** switch is enabled. See the **DriverConnect Superfleet Guide** for details.



On this page, you can:

1. Select your filters from the dropdown menus and click **Search**. See how to use Search Filters (page 163).

*The table displays the results of your search.*

2. To find specific information within your search results, begin typing in the search field.

*As you type, information that matches your search terms automatically displays in the table.*

3. Click the arrows next to a column header to sort the information in ascending or descending order on that column.

4. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

## Edit a Tractor

You can change the information for an existing tractor at any time.

The screenshot shows a modal window titled "Edit Tractor" with a close button (X) in the top right corner. The form contains the following fields:

- Tractor number: 00000 (dark gray background)
- Company: RM-0182 (Mahesh) (dark gray background)
- Terminal: T01481 (PSTTerminal) (dropdown menu)
- Device: Search Device (dropdown menu)

At the bottom of the form are two buttons: "Cancel" (dark gray) and "Save" (blue). Red circles with the numbers 2 and 3 are overlaid on the "Device" dropdown and the "Cancel" and "Save" buttons respectively.

1. On the **Tractors** page, click the text in a row to edit the tractor.

*The **Edit Tractor** window displays.*

2. Make changes to the tractor information. In the **Device** dropdown menu, you can select an ELD to link to the tractor (if enabled).

*Fields in dark gray cannot be edited.*

3. Click **Save** to save the changes or **Cancel** to close this window without saving changes.

## Groups

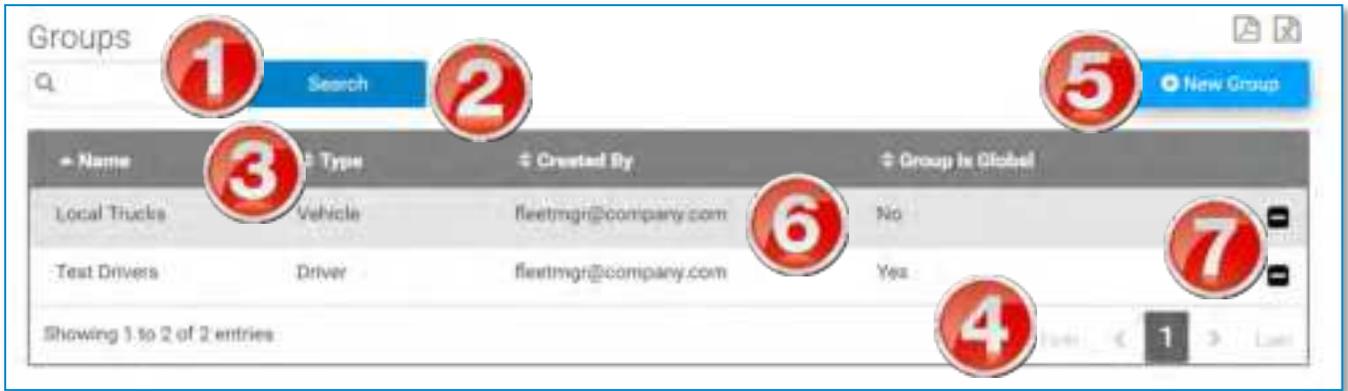
The **Groups** page allows you to create groups to more easily manage drivers. You can create groups of drivers or vehicles.

Using a group is a way to view and manage information about a specific set of drivers or vehicles. On reporting and compliance pages, you can filter information to display information only from a specific group.

Some examples of using groups include:

- A Fleet Manager created a group made up only of older vehicles and searched the **Vehicle Inspections** page for DVIRs created just for that group.
- A terminal manager created a group for drivers that have previously been cited for moving violations. The manager searched for instances of sudden acceleration and deceleration in that group on the **Events** page to ensure the drivers were operating their vehicles safely.

Groups can be individual or global. Individual groups can only be viewed and used by the user who creates them. Global groups can be viewed and used by all non-driver users (Fleet Managers and Terminal Managers).



### To search for groups:

1. Begin typing information about the group into the search box. You can type information from any column.

*As you type, information that matches your search terms automatically displays in the table.*

2. Click **Search** to display all groups.
3. Click the arrows next to a column header to sort the information in ascending or descending order on that column.
4. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

### To manage group:

5. Click **+ New Group** to create a new group. See instructions below.
6. Click the text in a group's row to edit the user. See instructions below.
7. Click the – sign to delete a group. See instructions below.

## Create a New Group

The screenshot shows a 'Create New Group' dialog box with the following elements:

- 1**: A close button (X) in the top right corner.
- 2**: A text input field for 'Group Name'.
- 3**: A dropdown menu for 'Select Group Type' with 'Driver' selected.
- 4**: Two list boxes. The left one, 'Select from list', contains three items: DR02 (checked), TD2 (unchecked), and DR002 (checked). The right one, 'Group of Driver', contains DR02 and DR002, with a 'Total 2' summary at the bottom.
- 5**: A checkbox labeled 'make group global' which is checked.
- 6**: 'Cancel' and 'Create' buttons at the bottom right.

1. On the Users page, click **+ New Group**.

*The **Create New Group** window displays.*

2. Enter a name for the group.

3. Select the group type:

## DriverConnect Portal Help

- **Driver** allows you to select drivers to include in the group. Drivers are created by the Fleet Manager from the **Users** page.
- **Vehicle** allows you to select vehicle to include in the group. Vehicle numbers are created by drivers in the DriverConnect app. Drivers enter the Tractor Number in the **Trip Info** screen. Vehicle numbers that have not been used in the fleet before are stored as new vehicles.

4. Select or deselect drivers or vehicles from the list on the left to add or remove them from the group.

The list on the right updates automatically as you change the group membership.

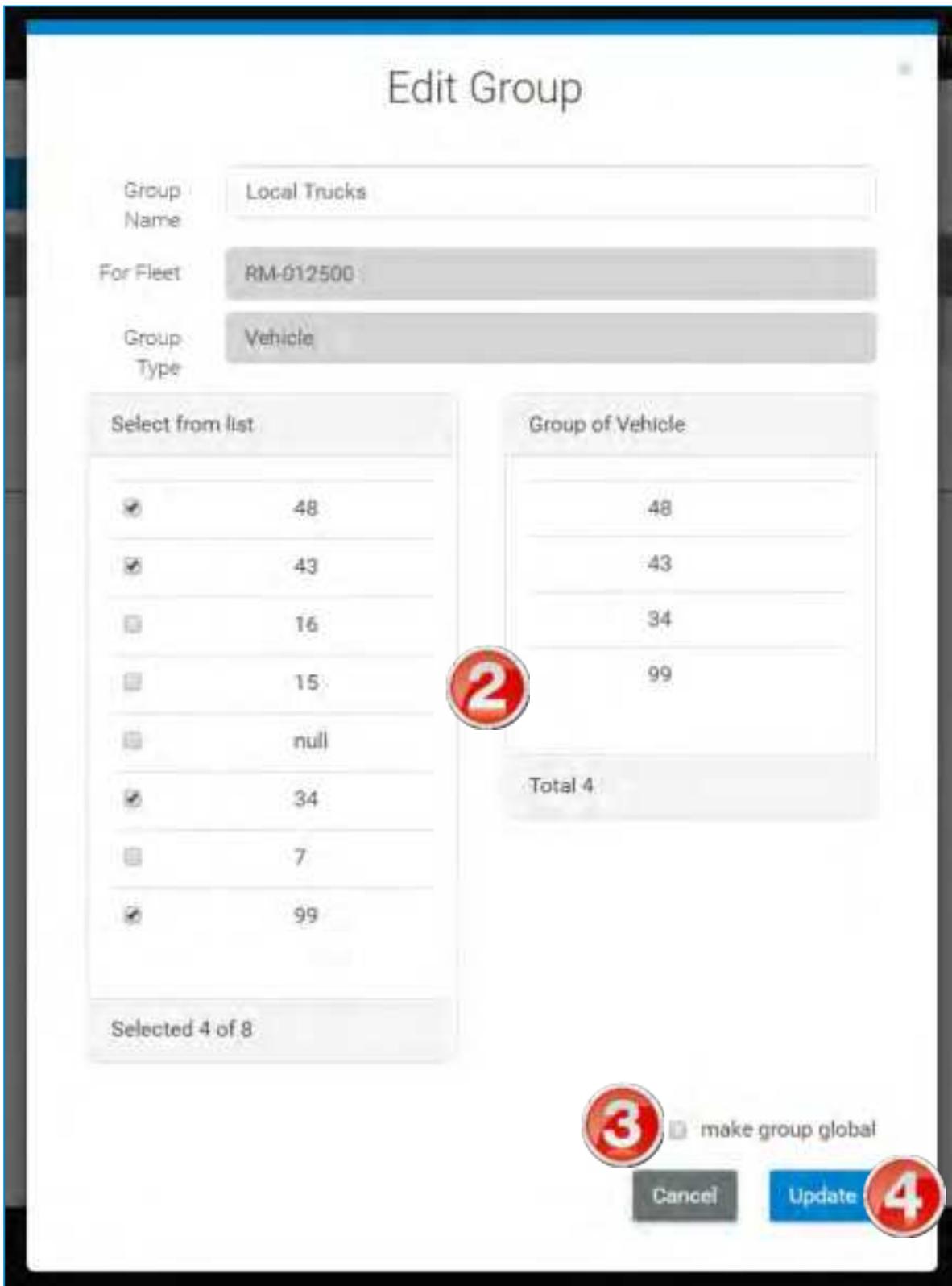
5. Select the **make group global** checkbox to allow all managers in your fleet to view and use the group.

*Global groups can be used by all fleet and terminal managers in the fleet, but not by drivers.*

6. Click **Create** to create the new user or **Cancel** to close this page without creating a new group.

## Edit a Group

You can change the name, membership, and global view of a group.



1. On the **Groups** page, click the text in a user's row to edit the user.  
*The **Edit Group** window displays.*

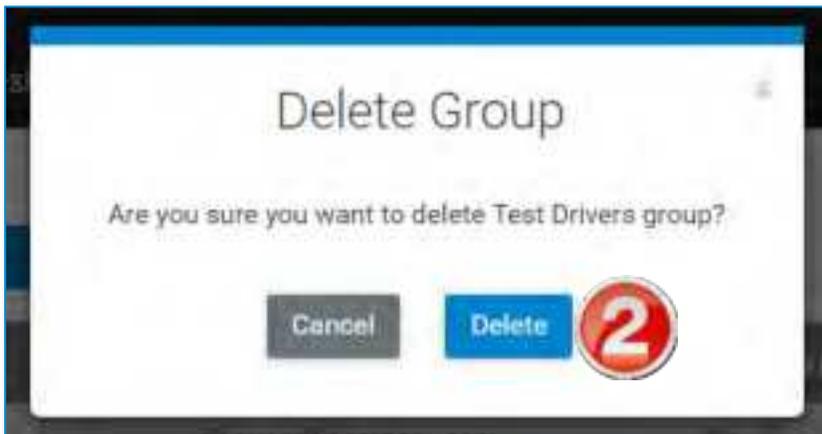
2. Select or deselect drivers or vehicles from the list on the left to add or remove them from the group.

The list on the right updates automatically as you change the group membership.

*Fields in dark gray cannot be edited.*

3. Select or deselect the **make group global** checkbox.
4. Click **Update** to save the changes or **Cancel** to close this window without saving changes.

## Delete a Group



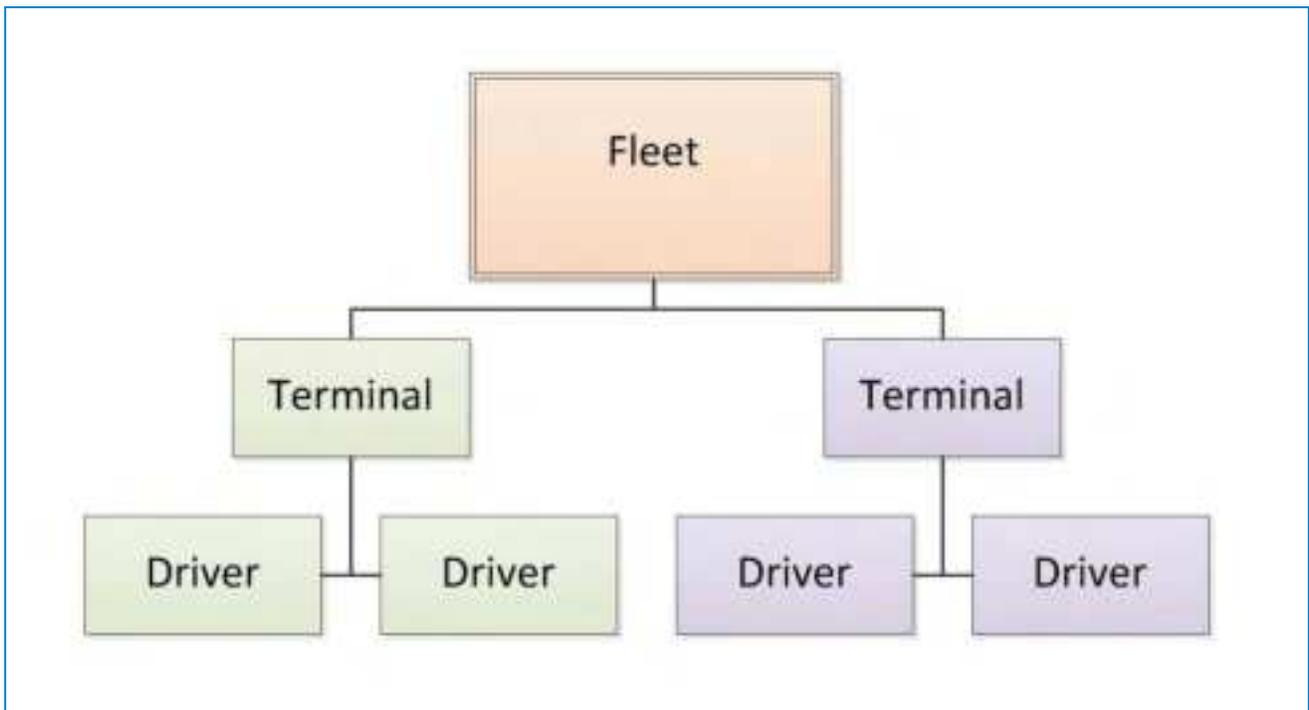
1. On the **Groups** page, click the Delete icon (☒).
2. On the **Delete Group** window, click **Delete** to delete the group. Click **Cancel** to cancel the delete process and leave the group intact.

# Terminal

On the **Terminal** page, you can create, edit, and delete terminals. A terminal is a subgroup of your fleet that is designed to make driver management simpler. Terminals can be regional offices, local branches, or satellite locations within your company.

Each company has a Fleet Manager who is responsible for the entire organization. The Fleet Manager can designate one or more Terminal Managers to manage a group of drivers. The Fleet Manager can access information for all Terminal Managers and drivers, regardless of terminal assignments. Terminal managers can only access information for drivers within their own terminals.

This chart shows how the fleet, terminals, and drivers are related:



Each Terminal Manager needs a user profile and must be created on the **Users** page. Terminal Managers do not have Driver IDs, and do

## DriverConnect Portal Help

not use the DriverConnect app. Instead, they manage a select group of drivers within their own terminal from the portal.

By default, each company is created with a Home terminal. The Fleet Manager automatically manages this terminal. You cannot delete the Home terminal. You can assign a new Terminal manager to the Home terminal.



### To search for terminals:

1. Begin typing information about the terminal into the search box. You can type information from any column.

*As you type, information that matches your search terms automatically displays in the table.*

2. Click **Search** to display all terminals.
3. Click the arrows next to a column header to sort the information in ascending or descending order on that column.
4. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

### To manage your terminals:

5. Click **+ Terminal** to create a new terminal. See instructions below.
6. Click the text in a row to edit the terminal. See instructions below.

**Create New Terminal**

Terminal Name:

Select feet:

Terminal Address:

Country:

State:

City:

Postal Code:

Terminal Telephone:

Yard Move - US Only:

Personal Conveyance - US:

Personal Conveyance - Canada:

Time Zone:

Daylight Saving Time

**Configuration**

**1** Hard Braking  
vehicle speed decreases by:  mph in a sec  
allowed values (1-11mph)

**1** Idling  
ignition is ON and vehicle speed is 0 for more than:  sec  
allowed values (0-300 sec)

**2** Speeding  
vehicle speed is greater than:  mph  
allowed values (25-60mph)

**10** Over Posted Speed Limit  
Vehicle exceeds posted speed limit by:  mph  
allowed values (1-11mph)

7. Click the – sign to delete a terminal. See instructions below.

## Create a New Terminal

1. On the Terminals page, click **+ Terminal**.

*The **Create New Terminal** window displays.*

2. Enter the information for the terminal. All fields are required.

**Note:** *The numbers in the Yard Move and Personal Conveyance fields are the number of miles allowed by the terminal for these categories. You can set these here for all drivers within the terminal.*

3. In the **Configuration** section, enter values for your terminal’s driving information. See below for descriptions.

4. Click **Create** to create the new terminal or **Cancel** to close this window without creating a new user.

## Edit a Terminal

You can change the information for an existing terminal at any time.

1. On the **Terminals** page, click the text in a row to edit the terminal.

*The **Update Terminal** window displays.*

2. Make changes to the terminal information.

*Fields in dark gray cannot be edited.*

3. In the **Configuration** section, update values for your terminal's driving information. See below for descriptions.

4. Click **Update** to save the changes or **Cancel** to close this window without saving changes.

### Update Terminal ✕

|  |   |
|--|---|
| Terminal Name  | <input type="text" value="DCLT LT Beta Test"/>                                    |
| Fleet  | <input style="background-color: #cccccc;" type="text" value="RM-011890"/>         |
| Terminal Address   | <input type="text" value="9855 Woods Drive"/>                                     |
| Country  | <input type="text" value="USA"/> ▼  |
| State  | <input type="text" value="Illinois"/> ▼   |
| City   | <input type="text" value="Skokie"/>   |
| Postal Code  | <input type="text" value="60077"/>  |
| Terminal Telephone                                       | <input type="text" value="18473296323"/>  |
| Yard Move - US Only                                      | <input type="text" value="5"/>  |
| Personal Conveyance - US                                 | <input type="text" value="5"/>  |
| Personal Conveyance - Canada                             | <input style="background-color: #cccccc;" type="text" value="47 miles - Canada"/> |
| Time Zone  | <input type="text" value="CST"/> ▼  |
| <input checked="" type="checkbox"/> Daylight Saving Time |   |

#### Configuration

- Ⓞ Hard Braking vehicle speed decreases by  **mph in a sec**  
allowed values (5mph-10mph)
- ⓘ Idling ignition is ON and vehicle speed is 0 for more than  **sec**  
allowed values (0-300 sec)
- ✔ Speeding vehicle speed is greater than  **mph**  
allowed values (35-85mph)
- ⓘ Over Posted Speed Limit Vehicle exceeds posted speed limit by  **mph**  
allowed values (1-15mph)

## Configuration

You can configure aspects of your terminal's driving information in the **Configuration** section. Settings made in this section apply to all drivers in the selected terminal.

| Setting                 | Description   | Value | Unit         | Allowed Values |
|-------------------------|---|-------|--------------|----------------|
| Hard Braking            | vehicle speed decreases by                          | 7     | mph in a sec | 5mph-10mph     |
| Idling                  | ignition is ON and vehicle speed is 0 for more than | 300   | sec          | 0-300 sec      |
| Speeding                | vehicle speed is greater than                       | 85    | mph          | 35-85mph       |
| Over Posted Speed Limit | Vehicle exceeds posted speed limit by               | 10    | mph          | 1-15mph        |

**Hard Braking:** The rate of decrease in speed a driver needs to reach in a sudden deceleration. This rate is measured in a decrease in miles per hour, per second (MPH/s). You can set this value between 5 and 10 MPH.

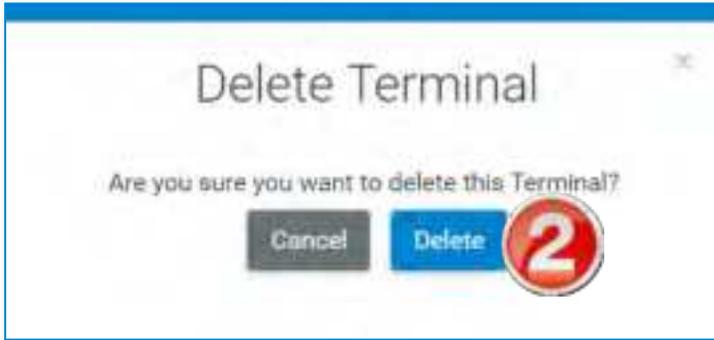
**Idling:** The number of second a vehicle is running (ignition on) before moving. You can set this value between 0 and 300 seconds (5 minutes).

**Speeding:** The speed (in miles per hour) a driver needs to reach to be considered speeding. You can set this value between 35 and 85 MPH.

**Over Posted Speed Limit:** The speed (in miles per hour) a driver is allowed to travel above the posted speed limit before an event is triggered. For example, if you set the Over Posted Speed Limit to 5 mph, you will receive events each time a driver exceeds the posted speed limit by 5 MPH or more. You can set this value between 1 and 15 MPH.

## Delete a Terminal

When you delete a terminal, the user profile of the Terminal Manager is also deleted. Also, all drivers assigned to that terminal are automatically reassigned to the Home terminal.



1. On the **Terminal** page, click the Delete icon (🗑️).
2. On the **Delete Terminal** window, click **Delete** to delete the terminal. Click **Cancel** to cancel the delete process and leave the terminal intact.

# Workflow

On the **Workflow** page, you can create, edit, and delete workflow templates. Workflows are a series of forms that can be created by a Fleet Manager and sent to a driver. The workflow is a sequence of steps that a driver needs to follow. The status of each step is tracked. Managers can also assign completion times to the steps in a workflow to ensure that a driver completes a workflow on time.

Use the **WORKFLOW** tab in the **Messaging** window to:

- Send a workflow to a driver
- Assign estimated completion times
- Track progress, including actual completion times
- View completed forms

The screenshot shows the 'Workflow' page interface. At the top left is a search bar with a magnifying glass icon and the text 'Enter text to search', marked with a red circle containing the number 1. To the right of the search bar is a blue button with a white plus sign and the text '+ Create New', marked with a red circle containing the number 2. Below these elements is a table with three columns: 'Workflow Title', 'Created On', and 'Last Updated'. The first row of the table has 'Destination' in the 'Workflow Title' column, '12/19/2016' in the 'Created On' column, and '12/19/2016' in the 'Last Updated' column. This row is marked with a red circle containing the number 3. The second row of the table has 'Trailer Accident' in the 'Workflow Title' column, '12/20/2016' in the 'Created On' column, and '12/20/2016' in the 'Last Updated' column. To the right of the table is a dropdown menu with the text 'Action' at the top, followed by 'Action', 'Edit', 'Delete', and 'Make a copy'. This dropdown menu is marked with a red circle containing the number 4.

| Workflow Title   | Created On | Last Updated | Action      |
|------------------|------------|--------------|-------------|
| Destination      | 12/19/2016 | 12/19/2016   | Action      |
| Trailer Accident | 12/20/2016 | 12/20/2016   | Edit        |
|                  |            |              | Delete      |
|                  |            |              | Make a copy |

On the **Workflow** page, you can:

## DriverConnect Portal Help

1. Begin typing information about the workflow into the search box.  
You can type information from any column.

*As you type, information that matches your search terms automatically displays in the table.*

2. Click **+ Create New** to create a new workflow.
3. Click in a workflow row to access more options from the **Action** dropdown menu.
4. Select **Edit** to edit the workflow; **Delete** to delete it; or **Make a copy** to copy the workflow with a new name.

See below for full instructions.

## Create a New Workflow

Workflows contain one or more tasks for the driver to complete. Each task contains one or more forms.

When you send a workflow to a driver, you can assign completion times for each task. Therefore, you should create workflows so that each task contains only forms that can be completed within the time frame you assign.

The screenshot shows the 'Create New Workflow Template' interface. At the top, there is a title 'Create New Workflow Template' and a blue button labeled 'Add a task'. Below this is a 'Workflow Name' field containing 'Workflow 001'. A blue header bar for 'task 1' contains a 'Delete' button. Underneath, there are two main sections: 'Task Name' and 'Estimated Date Time'. The 'Task Name' field contains 'Enter Name'. The 'Estimated Date Time' section has two input fields: 'mm/dd/yyyy' and 'hh:mm'. Below these is a 'Forms' dropdown menu with a list of options: 'Arrived Shipper', 'Accident Report', 'Arrived Consignee', 'Arrived Shipper', 'Arrived Stop', 'Departed Shipper', 'Depart Stop', and 'Empty Call'. The 'Arrived Shipper' option is selected and highlighted. To the right of the dropdown, there is a tag labeled 'Arrived Shipper' with a close button (x). At the bottom right, there are 'Cancel' and 'Save' buttons.

1. Click **+ Create New** on the **Workflow** page.

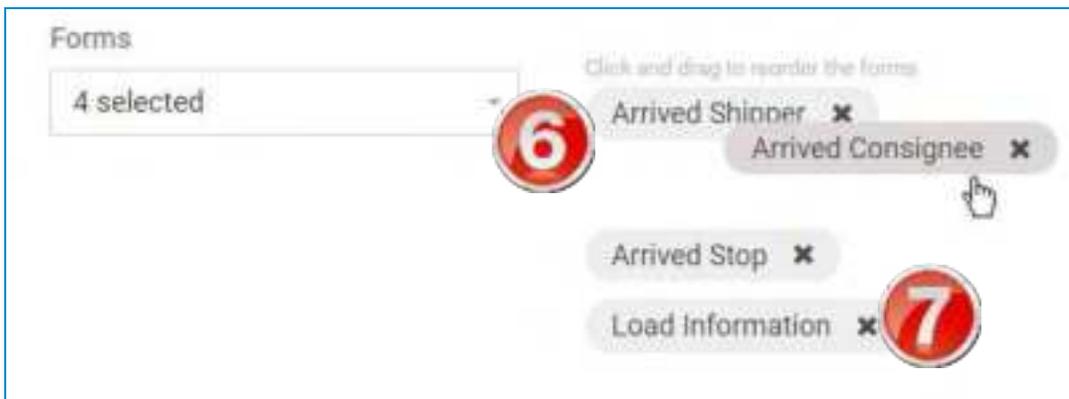
*The **Create New Workflow Template** page displays.*

2. Enter a name for the workflow in the **Workflow Name** field.

3. Enter a name for the task in the **Task Name** field.

4. Select one or more forms to include in this task from the **Forms** dropdown menu.

5. After you select a form, it displays with a checkbox in the dropdown menu, and displays in the forms order section to the right.



6. If you select multiple forms, you can click and drag to move them into a different order.

*The driver will need to complete the form on the top first before continuing down the list.*

7. Click the **X** to the right of a form to remove it from the workflow.

### Create New Workflow Template

Workflow Name **8** Add a task

Workflow Example

**task 1** **9** Delete

**Task Name**  
Arrival info

**Estimated Date Time**  
(These fields will be populated when the fleet manager sends a new workflow)  
mm/dd/yyyy hh:mm

**Forms**  
4 selected

Click and drag to reorder the forms

Arrived Consignee ✕

Arrived Shipper ✕

Arrived Stop ✕

Load Information ✕

**task 2** **9** Delete

**Task Name**  
Fuel Request

**Estimated Date Time**  
(These fields will be populated when the fleet manager sends a new workflow)  
mm/dd/yyyy hh:mm

**Forms**  
Fuel Authorization, Request Fuel Stop

Click and drag to reorder the forms

Fuel Authorization ✕

Request Fuel Stop ✕

**10**

Cancel Save

8. Click **Add a task** to add another task to the workflow.

9. Click **Delete** in the top bar of a task to delete that task.

All forms contained in that task will also be removed from the workflow.

10. Click **Save** to save the workflow or click **Cancel** to exit without saving and return to the **Workflow** page.

## Edit a Workflow

When editing a workflow, you can perform all of the same actions you did when creating a workflow.

The screenshot shows the 'Edit Workflow' interface. At the top, there is a 'Workflow Name' field containing 'Trailer Accident' (callout 2) and an 'Add a task' button (callout 6). Below this are two task sections. 'task 1' has a 'Delete' button (callout 7) and contains a 'Task Name' field with 'Report' (callout 3), an 'Estimated Date Time' field with 'mm/dd/yyyy', and a 'Forms' dropdown menu with 'Accident Report'. 'task 2' has a 'Delete' button (callout 8) and contains a 'Task Name' field with 'New Trailer', an 'Estimated Date Time' field with 'mm/dd/yyyy', and a 'Forms' dropdown menu with 'Load Information, Trailer Swap' (callout 4). Below the tasks are 'Cancel' and 'Update' buttons. A hand cursor is shown over a task element (callout 5).

1. On the **Workflow** page, select **Edit** from the **Actions** dropdown menu of the workflow you want to edit.

The **Edit Workflow** page displays.

2. Edit the workflow name in the **Workflow Name** field.
3. Edit the task name in the **Task Name** field.
4. Select one or more forms to include in this task from the **Forms** dropdown menu.
5. Click and drag to move forms into a different order.

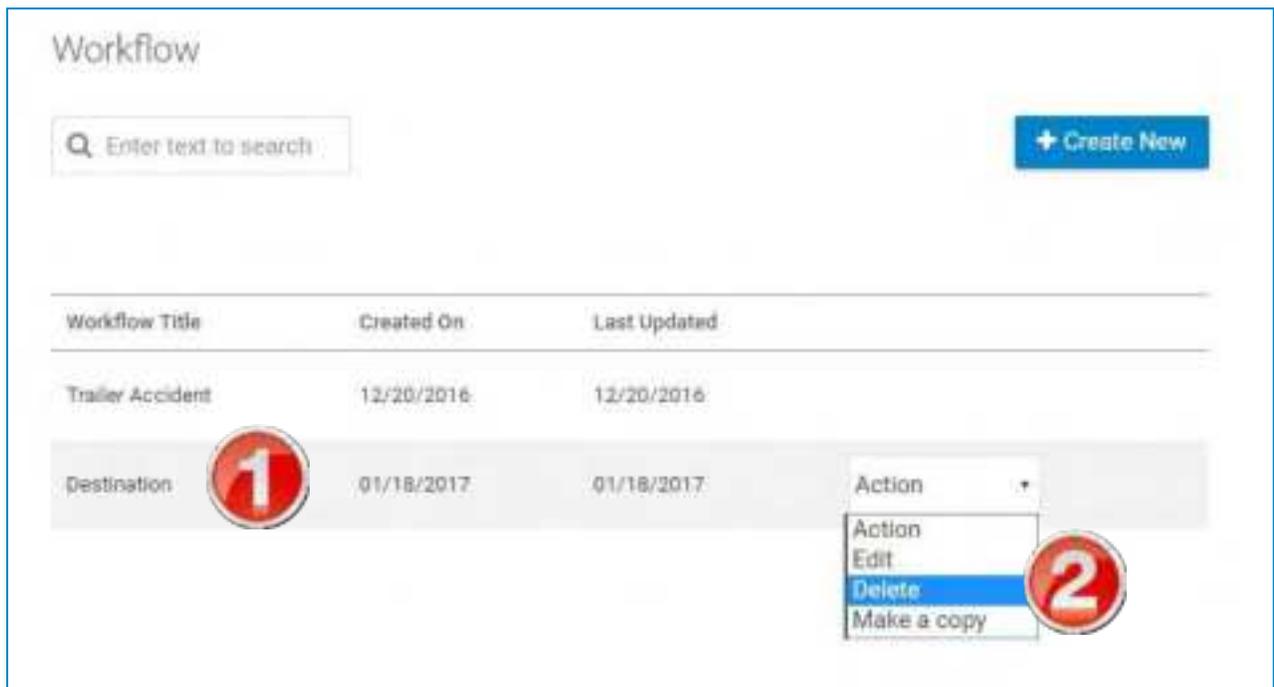
*The driver will need to complete the form on the top first before continuing down the list.*

6. Click **Add a task** to add another task to the workflow.
7. Click **Delete** in the top bar of a task to delete that task.

*All forms contained in that task will also be removed from the workflow.*

8. Click **Save** to save the workflow or click **Cancel** to exit without saving and return to the **Workflow** page.

## Delete a Workflow

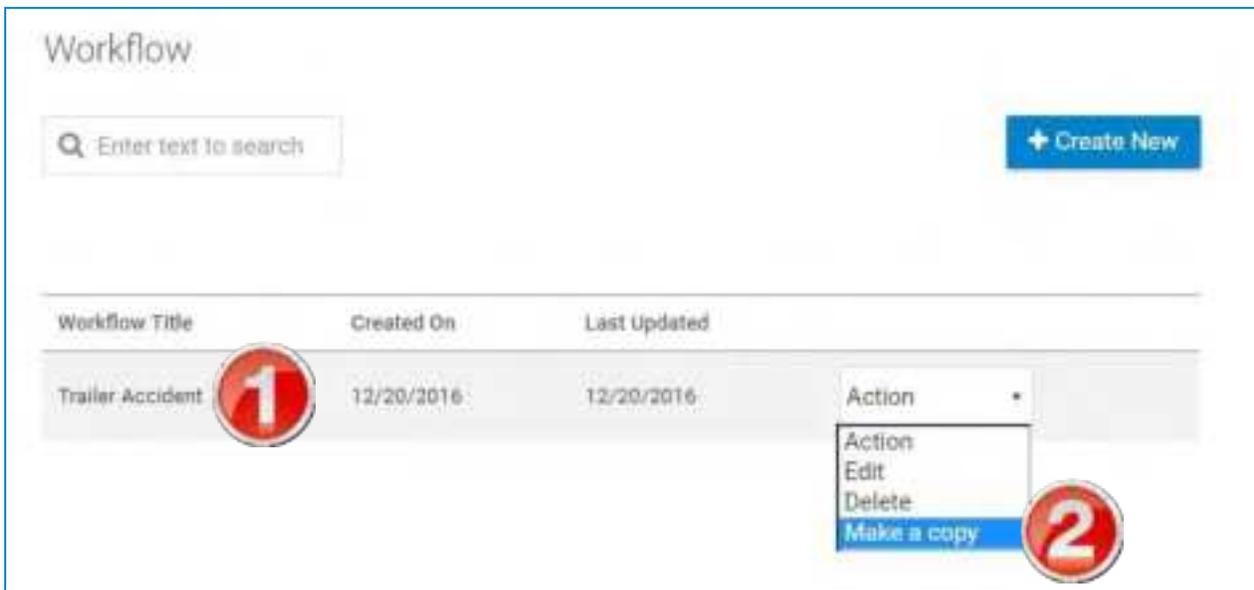


1. Click the row of the workflow you want to delete.

2. From the **Action** dropdown menu, select **Delete**.
3. The workflow is deleted immediately, and a confirmation message displays at the top of the page.



## Make a Copy of a Workflow



1. Click the row of the workflow you want to copy.
2. From the **Action** dropdown menu, select **Make a copy**.
3. A new workflow is created, with the words “copy of” in the title.  
*To change the title, see above for steps on editing the workflow.*

## DriverConnect Portal Help

| Workflow Title           | Created On | Last Updated |
|--------------------------|------------|--------------|
| Trailer Accident         | 12/20/2016 | 12/20/2016   |
| copy of Trailer Accident | 01/18/2017 | 01/19/2017   |



## Compliance Menu

The **Compliance** menu provides information on hours of service records and violations, vehicle inspections, and information about driving patterns and vehicle use.



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## Snapshot

The **Snapshot** page shows Hours of Service (HOS) and Driver-Vehicle Inspection Report (DVIR) information over the past eight days.

**If you are a Driver:** You will only see HOS and DVIR information for yourself.

**If you are a Fleet Manager (FM) or a Terminal Manager (TM):**  
You can select any of your drivers to view.

HOS categories include:

- Off Duty (**OFF**)
- Sleeper Berth (**SB**)
- Driving (**D**)
- On Duty (**ON**)

**Snapshot**

Select FI | Please S | **1** | Search

| 01/03/2017 | 01/04/2017 | 01/05/2017 | 01/06/2017 | 01/07/2017 |
|------------|------------|------------|------------|------------|
| 24:00Hrs   | 24:00Hrs   | 24:00Hrs   | 24:00Hrs   | 24:00Hrs   |
| OFF 13:15  | OFF 19:12  | OFF 14:35  | OFF 14:49  | OFF 24:00  |
| SB 00:00   |
| D 00:00    | D 00:44    | D 01:41    | D 00:00    | D 00:00    |
| ON 10:44   | ON 04:04   | ON 07:42   | ON 09:10   | ON 00:00   |
| DVIR: ✓ 👍  | DVIR: ✓ 👍  | DVIR: ✓ 👍  | DVIR: ✓ !  | DVIR: ✓ 👍  |

| 01/08/2017 | 01/09/2017 | 01/10/2017 |
|------------|------------|------------|
| 24:00Hrs   | 24:00Hrs   | 17:58Hrs   |
| OFF 24:00  | OFF 24:00  | OFF 17:58  |
| SB 00:00   | SB 00:00   | SB 00:00   |
| D 00:00    | D 00:00    | D 00:00    |
| ON 00:00   | ON 00:00   | ON 00:00   |
| DVIR: ✓ 👍  | DVIR: ✓ 👍  | DVIR: ✓ !  |

1. Select a driver from the dropdown menus and click **Search** (FMs and TMs only).
2. The previous eight days of HOS and DVIR information display in individual date blocks.



Each date block shows:

3. The date of service.
4. The total number of hours reported for that date.
5. A breakdown of the total time reported for each HOS category.
6. Two status icons for the day's DVIR.

DVIR status icons include:



**Certified.** This DVIR has been certified by a mechanic. DVIRs that are **NOT** OK to drive are required to be certified. No-Defect DVIRs and DVIRs with defects that are OK to drive are not required to be certified.



**Not Certified.** This DVIR has not been certified by a mechanic.



**No Defects.** No defects were reported on the DVIR.



**Defects Reported, Tractor/ Trailer OK to Drive.** Defects were reported on the DVIR, but the driver indicated that the tractor/trailer was still safe to drive.



**Defects Reported, Tractor Trailer NOT OK to Drive.** Defects were reported on the DVIR, and the driver indicated that the tractor/trailer is unsafe to drive. The defects must be repaired, and the DVIR must be certified by a mechanic.

# Hours of Service

The **Hours of Service** page lets you view Hours of Service (HOS) information for drivers within a certain time range. Each entry contains a link to a graphic HOS display. You can search for HOS records for your entire fleet, or for an individual driver.

**If you are a Driver:** You will only see HOS information for yourself.

**If you are a Fleet Manager (FM) or a Terminal Manager (TM):**

You can select any of your drivers to view.



1. Select your filters from the dropdown menus and click **Search**. See how to use Search Filters (page 163).

*The report table displays the results of your search. The default view shows the newest HOS entries first.*

2. Color-coded bars show the status of an edited log. See below.
3. Click a blank space in a column to display the *Advanced Options* menu bar. See using Advanced Options on page 167.
4. To view an individual HOS record, click the text in a row.

*You can click the text in any column. The cursor changes to the finger icon. After clicking, the HOS record displays in a separate **Hours of Service Details** window (see below).*

5. Click an export icon to export the report to a .PDF or an Excel file. See how to Export a Report (page 166).

*The exported HOS report contains complete information about the driver's status and tractor information. The report contains all information for the selected duration.*

6. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

## View Hours of Service Details

The **Hours of Service Details** page shows the driver's HOS information, including: driver name, date of record, HOS graph, and individual HOS entries. This page also displays violations, if any.

### Hours of Service Details

Previous day **8**
Next day **9**

Driver Name: Shweta Ashtake **1**

Created Date: Sat, February 8th

Hos Time Zone: EST

Rule Set: US 8 days/70 hours (Interstate)

Exemptions: None

Certify

Edit Logs **6**

**7**

Latest Logs History ELD Events **5**

Accepted

Accepted by Shweta Ashtake 02/14/2020 1:30:01

Accept Reason: toutx

| Status   | Time/Start | Duration (hh:mm) | Location                                | Tractor No    | Trailer No | Trip Name | DOT # | Origin | Updated on |
|----------|------------|------------------|---|---------------|------------|-----------|-------|--------|------------|
| OFF DUTY | 12:00 AM   | 05:29            | Not able to determine location <b>3</b> | Not Available | rrrr       | My trip   | 23563 |        |            |
| DRIVING  | 05:29 AM   | 06:51            | App portal                              | Not Available | rrrr       | My trip   | 23563 |        |            |

This window displays:

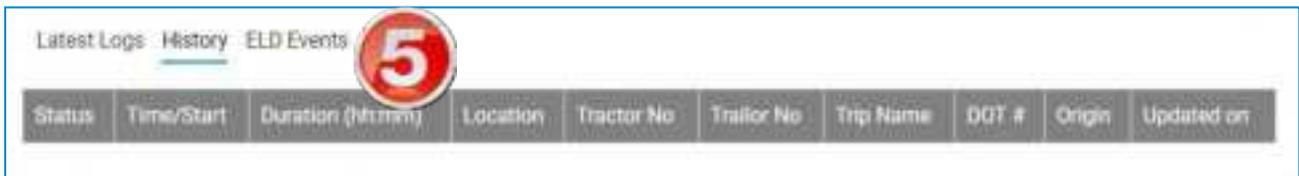
1. The driver and date of the report.
2. A graph displaying the HOS record.
3. A detailed table showing each change of status entry, time, duration, and location and vehicle information, if available.

## DriverConnect Portal Help

4. A table on the bottom of the page showing the HOS violation type (if any) and the time the violation occurred (not shown).

On this window, you can:

5. Click a tab header to view the Latest Logs, History, or ELD Events (shown below)
6. Click **Edit Logs** to edit the driver's HOS entries for the selected date.
7. Click the .PDF icon to export the report to a .PDF file. See how to Export a Report (page 166).
8. Click **Previous Day** to view the detail page for the previous day, or click **Next Day** to view the next day's detail page.
9. Click the **X** to close the **Hours of Service Details** page and return to the **Hours of Service** page.



| Status | Time/Start | Duration (M:MM) | Location | Tractor No | Trailer No | Trip Name | DOT # | Origin | Updated on |
|--------|------------|-----------------|----------|------------|------------|-----------|-------|--------|------------|
|--------|------------|-----------------|----------|------------|------------|-----------|-------|--------|------------|



| Status/Event Type | Time/Start | Location                       | Odometer | Eng. Hours | Driver Comments | Origin | Record Status |
|-------------------|------------|--------------------------------|----------|------------|-----------------|--------|---------------|
| Off Duty          | 12:00 am   | Not able to determine location | 0        | 0          | Not Available   | Auto   | Active        |

## Edit Hours of Service Logs

The DriverConnect portal allows Fleet Managers to edit certified HOS logs on the **Edit Hours of Service** page, provided it is within the past 7 days. Logs that have not yet been certified by drivers cannot be edited. Note that this functionality is only for Fleet Managers. Drivers can certify and edit logs only on the driver app.

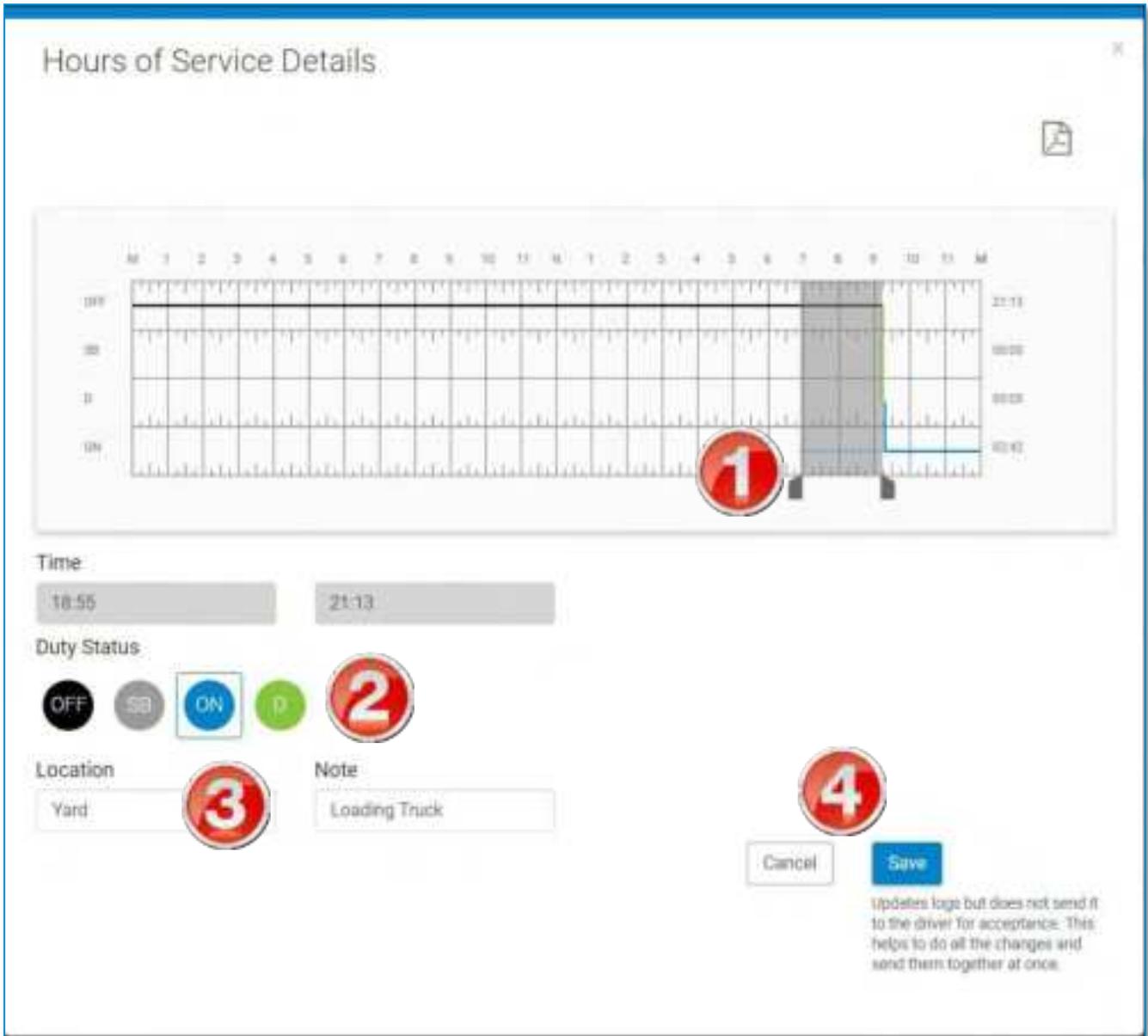
After editing, the updated log entry is sent to the driver. The driver must either accept or reject the edits in the DriverConnect app. Edited logs that have not been accepted/rejected display as “pending” in the app and portal.

**Note:** Even though a manager can update a driver’s logs, *the driver is still responsible* for making sure the logs are updated and accurate.

Once you are in the **Hours of Service Detail** page, you can make edits. Logbook edits work by adding new duty status entries for a time frame you define. These new entries *overwrite and replace* existing entries.

Only On Duty, Off Duty, and Sleeper Berth time can be edited. You cannot edit (add new or overwrite existing) driving time.

Click **Edit Logs** on the **Edit Hours of Service** page to begin.



To edit a HOS log:

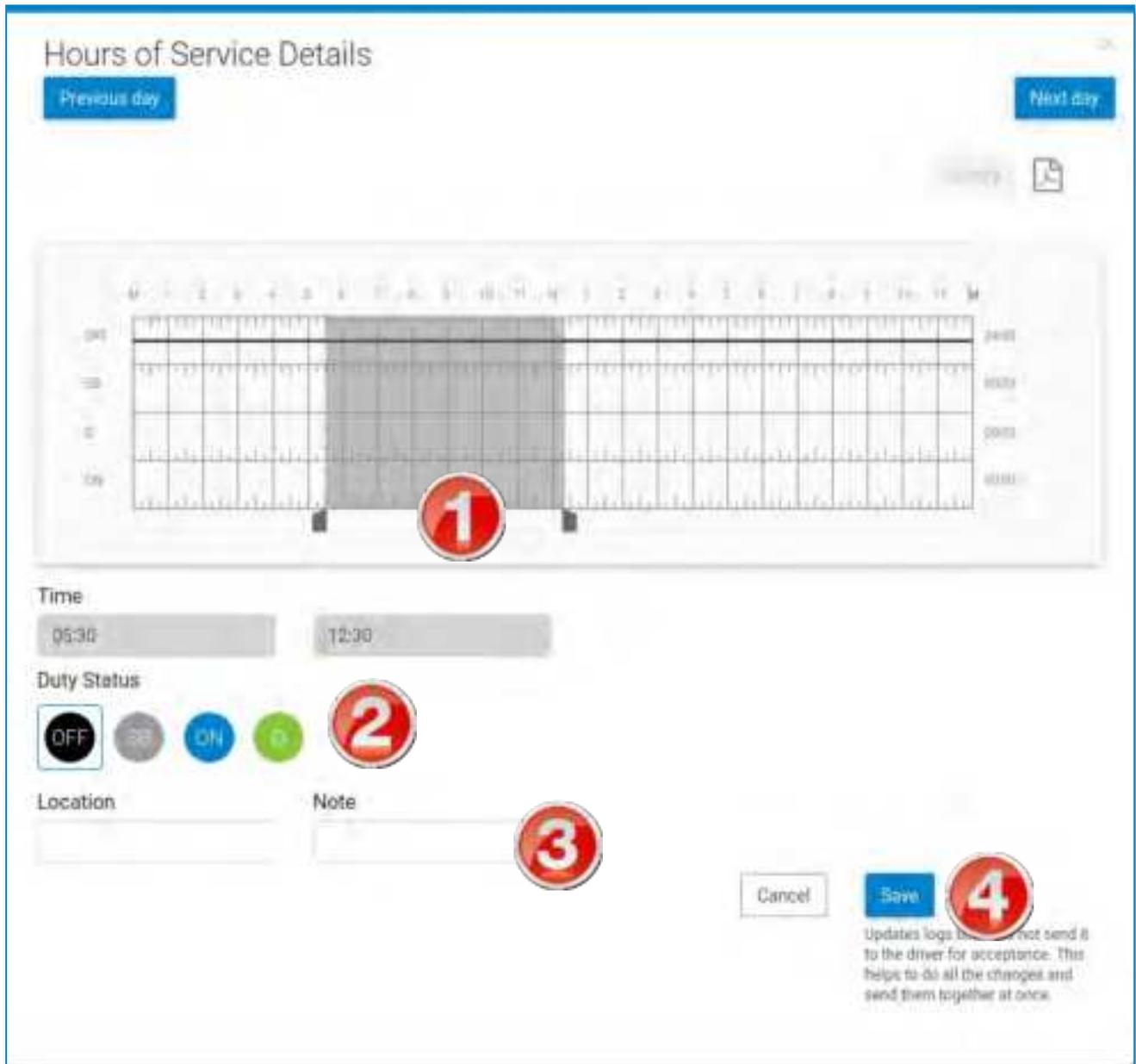
1. Use the sliders to select an updated time range.

*The new time range displays in gray.*

2. Click the new duty status icon.
3. Enter a location and a note, if applicable.
4. Click **Save** to save the edit or **Cancel** to exit without changing.

The **Hours of Service Detail** page displays again. Updated times are shown with a yellow tag.

5. Click **Edit Logs** again to add another edited time. You can make as many time edits as you need.
6. Click **Send edited logs to driver** to confirm your updates and send them to the driver. You cannot make further edits after sending the logs to the driver.



### Hours of Service Details

Driver Name: driver **5** Edit Logs

Created Date: Wed, September 27th

Hrs Time Zone: CST

Latest Logs History ELD Events

**Edited (Not sent to driver for acceptance yet)** **6** Send edited logs to driver  
 Edited by Fleet Manager 28-09-2017 6:03:25

| Status   | Time/Start | Duration (hh:mm) | Location                         | Tractor No | Trailer No | Trip Name      | DOT #     | Origin  | Updated on       |
|----------|------------|------------------|----------------------------------|------------|------------|----------------|-----------|---------|------------------|
| OFF DUTY | 12:00 AM   | 18:55            | note                             | 100        | 128        | Nashville Trip | DCLT12345 | Manager | 09/28/2017 18:03 |
| ON DUTY  | 06:55 PM   | 02:17            | Yard                             | 100        | 128        | Nashville Trip | DCLT12345 | Manager | 09/28/2017 18:03 |
| DRIVING  | 09:13 PM   | 00:05            | Downtown, De Kalb Tennessee 3705 | 100        | 128        | Nashville Trip | DCLT12345 |         |                  |

## Log Statuses

On the **Hours of Service** page, a log can display with one of the following statuses:

- Logs the driver has entered, but has not yet certified, display as “Not Certified.”

### DriverConnect Portal Help

- Logs certified by the driver display as “Certified.”
- When you edit and save a log, the status changes to “Edited.”
- When you send an edited log to the driver, the status changes to “Pending Acceptance.”

The driver has the ability to either approve or reject an edited log.

- If the driver rejects the changes, the status displays as “Rejected.”
- If the driver approves the changes, the status displays as “Approved.”

Edited statuses also display with a color-coded bar:

- Green: Edit has been approved by the driver
- Red: Edit has been rejected by the driver
- Orange: Edit is pending acceptance
- Yellow: Edit has been made in the portal, but has not been sent to the driver

# Vehicle Inspections

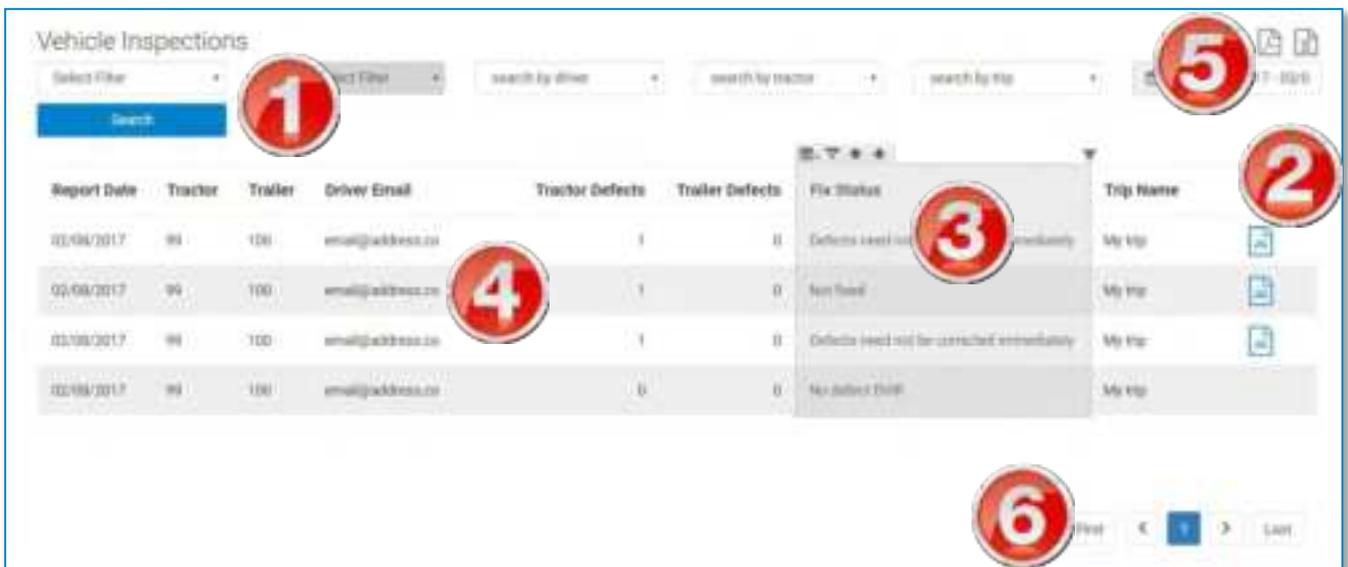
The **Vehicle Inspections** page displays Driver-Vehicle Inspection Reports (DVIRs) for each driver and tractor during a date range. You can export the list of DVIRs to a .PDF or Excel report. You can also view an individual DVIR and export it to a .PDF file.

The Fix Status column shows the status of the DVIR. See below for details on statuses.

**If you are a Driver:** You will only see DVIR information for yourself.

**If you are a Fleet Manager (FM) or a Terminal Manager (TM):**

You can select any of your drivers to view.



1. Select your filters from the dropdown menus and click **Search**. See how to use Search Filters (page 163).

*The report table displays the results of your search. The default view shows the newest DVIRs first.*

2. The image icon (📷) displays in a row if the driver uploaded pictures with the DVIR.

3. Click a blank space in a column to display the *Advanced Options* menu bar. See using Advanced Options on page 167.

4. To view an individual DVIR, click the text in a row.

*You can click the text in any column. The cursor changes to the finger icon. After clicking, the DVIR displays in a separate **Daily Vehicle Inspection Report** window (see below).*

5. Click an export icon to export the report to a .PDF or an Excel file. See how to Export a Report (page 166).

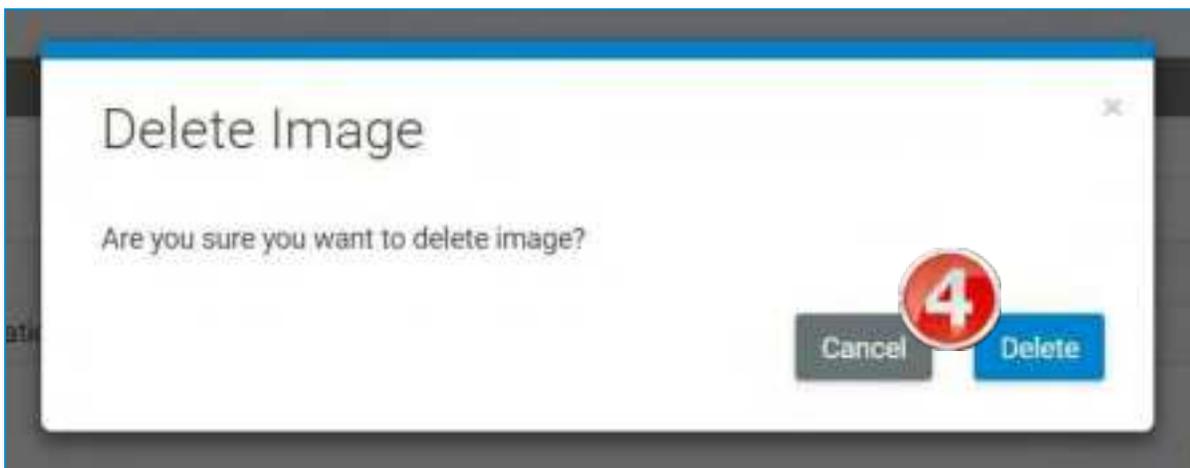
6. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

## Daily Vehicle Inspection Report

When you click to open a DVIR, the report displays in the **Daily Vehicle Inspection Report** window. This window displays the tractor and trailer defects listed on the report, the signature of the driver who reported them, and additional comments made by the driver.



1. Click anywhere in a column to display the *Advanced Options* menu bar. See using *Advanced Options* on page 167.
2. Click the .PDF icon to export the report to a .PDF file. See how to *Export a Report* (page 166).
3. Pictures to support the DVIR display in the **Images** section.  
You can click the **X** on a picture to delete it from the DVIR:

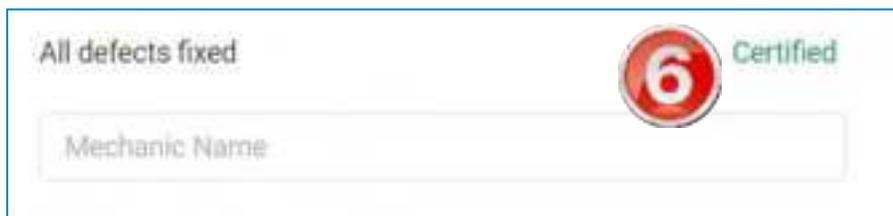


4. Click **Delete** to remove the image from the DVIR or **Cancel** to keep the image and return to the **Daily Vehicle Inspection Report** window.
5. You can upload additional pictures (up to 3 total per DVIR). Click **+ Upload**.

*Select a picture from your computer to upload and attach to the DVIR.*

6. For defects listed as **Not Fixed** (that is, when the driver reports that the vehicle cannot be operated safely), the DVIR must be certified upon repair.

Once the repair has been made, type the name of the individual who certified the repair, and click **Certify Defects**.



The screenshot shows a section of a DVIR form. On the left, it says "All defects fixed". In the center, there is a red circular icon with a white number "6". To the right of the icon, the word "Certified" is displayed in green. Below these elements is a text input field with the placeholder text "Mechanic Name".

*The status changes to **Fixed**, and displays as **Certified** in the **Daily Vehicle Inspection Report** window*

7. Click the **X** to close the **Daily Vehicle Inspection Report** window and return to the **Vehicle Inspections** page.

## Fix Status

The Fix Status column lists the status of each DVIR.

| Fix Status  |
|---|
| Defects need not be corrected immediately                     |
| Fixed on :03/03/2017 06:56:06 PM, Fixed by :<br>Mechanic Name |
| Defects need not be corrected immediately                     |
| No defect DVIR  |
| Not fixed   |

These statuses include:

- **Not Fixed:** The DVIR lists defects that make the vehicle unsafe to operate. The vehicle or trailer needs to be repaired before operation, and the repair needs to be certified on the portal.
- **Defects need not be corrected immediately:** The DVIR lists defects, but the vehicle can still be operated safely. The vehicle or trailer still needs to be repaired, and the repair needs to be certified on the portal.
- **Fixed on: (Date), Fixed by (Name):** The defect has been repaired on the date listed, by the individual listed, and certified. The vehicle or trailer is now safe to operate.
- **No defect DVIR:** No defects were reported on the DVIR.

# Personal Conveyance

The **Personal Conveyance** page provides a report on yard move and personal conveyance (or “Line 5”) driving time.

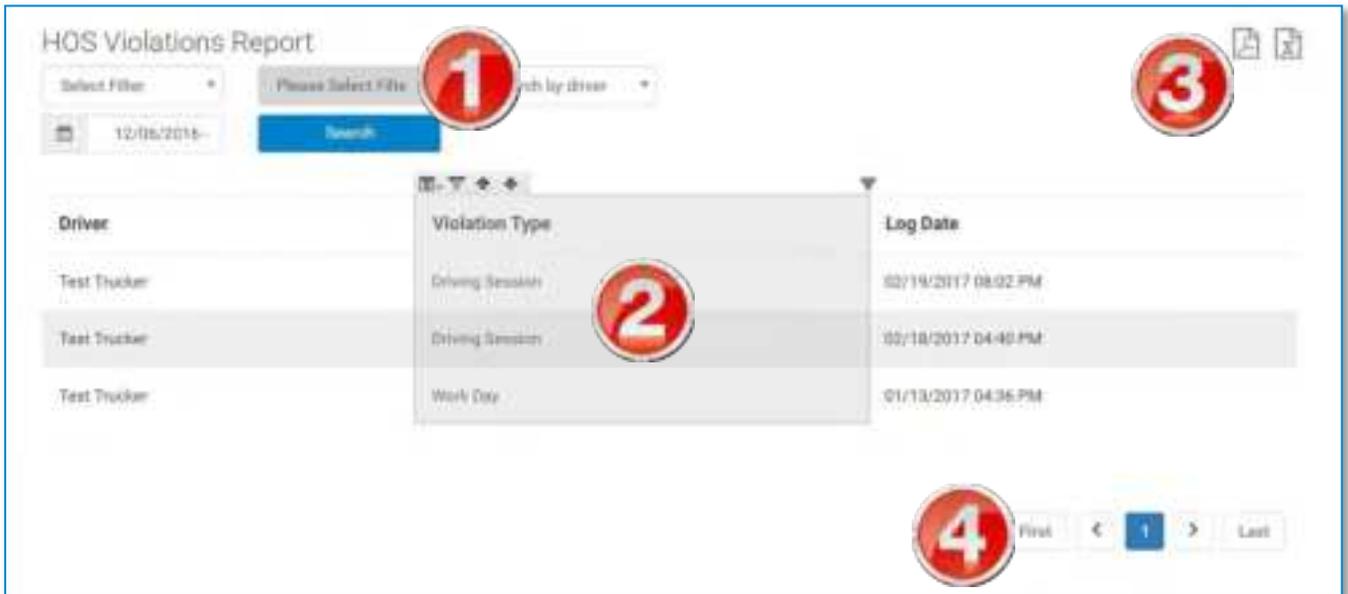
The screenshot shows the 'Personal Conveyance Report' page. At the top, there are several filter dropdown menus: 'Select FTR', 'Please Select FTR', 'Search by driver', and 'Search by Status'. A date selector is set to '12/04/2016'. A red circle with the number '1' is placed over the 'Search' button. Below the filters is a table with columns: Vehicle, Driver, Date, Start Time, End Time, Location, Duration(Hic:min), Status Type, Trip Name, and Comment. A red circle with the number '2' is placed over the 'Duration(Hic:min)' column header. At the top right, there are two icons for exporting the report, with a red circle and the number '3' next to them. At the bottom right, there are pagination controls including 'First', '<', '>', and 'Last', with a red circle and the number '4' next to them.

| Vehicle | Driver       | Date       | Start Time | End Time | Location      | Duration(Hic:min) | Status Type         | Trip Name     | Comment                 |
|---------|--------------|------------|------------|----------|---------------|-------------------|---------------------|---------------|-------------------------|
| 99      | Test Truckee | 03/06/2017 | 03:15 PM   | 03:39 PM | Not Available | 00:23             | Personal Conveyance | Test Trip 1   |                         |
| 16      | Test Truckee | 12/23/2016 | 06:27 PM   | 06:40 PM | Not Available | 00:12             | Yard Move           | Not Available |                         |
| 48      | Name Driver  | 12/09/2016 | 12:00 AM   | 05:49 PM | parking lot   | 16:49             | Yard Move           | Not Available | moving from bay 2 to 18 |
| 48      | Name Driver  | 12/08/2016 | 11:09 AM   | 12:00 AM | Not Available | 10:50             | Yard Move           | Not Available | Not Available           |

1. To begin, select your filters from the dropdown menus, and click **Search**. See how to use Search Filters (page 163).  
*The report table displays the results of your search.*
2. Click anywhere in a column to display the *Advanced Options* menu bar. See using Advanced Options on page 167.
3. Click an export icon to export the report to a .PDF or an Excel file. See how to Export a Report (page 166).
4. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

# HOS Violations

The **HOS Violations** page lists a driver's Hours of Service violations, if available, along with the date and time the violation was logged.



1. To begin, select your filters from the dropdown menus, and click **Search**. See how to use Search Filters (page 163).

*The report table displays the results of your search.*

2. Click anywhere in a column to display the *Advanced Options* menu bar. See using Advanced Options on page 167.

3. Click an export icon to export the report to a .PDF or an Excel file. See how to Export a Report (page 166).

4. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

# Current Totals

The **Current Totals** page shows how much time each driver has left to drive and be on duty for the day/week.



1. To begin, select your filters from the dropdown menus, and click **Search**. See how to use Search Filters (page 163).  
*The report table displays the results of your search.*
2. Click an export icon to export the report to a .PDF or an Excel file. See how to Export a Report (page 166).
3. If the information from your search spans multiple pages, click the pagination buttons to jump to a different page.

