



CoPILOT[®] TRUCK[™]



CoPilot[®] FleetPortal[™] User Guide

2015 Q4 Edition

Designed for:



A product of:



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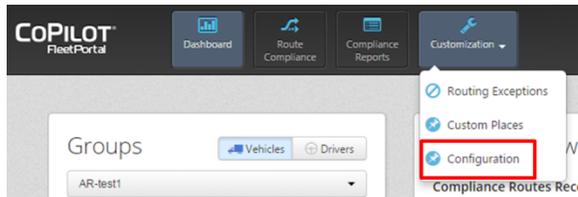
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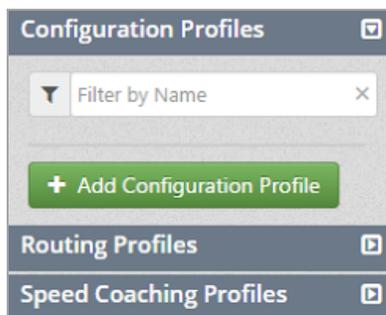
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1. Chapter 1: Creating, Editing, and Assigning Vehicle Configuration Profiles

Configuration Profiles are found in the Configuration option under the Customization tab.



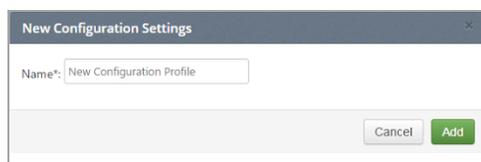
There are three expandable sections on the left side of the screen. Open the Configuration Profiles section to begin.



1.1. Creating Configuration Profiles

The naming convention for your company's Configuration Profiles becomes more important as you add more profiles and can speed the administrative process in the future when switching active profiles for groups.

Adding a new profile is simple – click the **+ Add Configuration Profile** button and enter the name of the new profile in the pop up.



1.2. Editing Configuration Profiles

To edit an existing profile, select it from the list of profiles on the left. Once changes have been made, click **Save** to keep them.

To automatically apply this Configuration Profile to vehicles in all newly created groups (as imported from PeopleNet) select **Use as Default for New Vehicle Groups** at the top of the settings section. Only one profile can be the default Configuration Profile for new groups.

FleetPortal Sync Intervals

CoPilot polls FleetPortal for updates with the latest Beta code on bootup and every 6 hours after that by default. You can adjust the frequency of this polling by each of the following components:

- Configuration Profiles
- Vehicle Routing Profiles
- Speed Coaching Profiles
- Avoids / Favors
- Temporary Road Closures
- Custom Places (POIs)

The screenshot shows a configuration profile settings page. At the top, there is a checkbox labeled "Use as Default for New Vehicle Groups". Below this is a "Name" field with a dropdown menu currently showing "New Configuration Profile". The main section is titled "FleetPortal Sync Intervals" and contains six input fields, each with a "6" value and a help icon: "Configuration Setting Profile (hours)", "Routing Profiles (hours)", "Speed Coaching Profile (hours)", "Avoid/Favors (hours)", "Temporary Road Closures (hours)", and "Custom Places (hours)". Below these are two expandable sections: "Compliance" and "Driver Accessibility".

Off Route Threshold

By default, CoPilot considers any movement more than 0.2 miles from the prescribed route to be Off Route. You can change this under the Compliance section, affecting all Route Compliance triggers for that vehicle.

Note: *RouteSync configurations will override the default or Configuration Profile settings for Off Route threshold for active RouteSync routes.*

This screenshot shows the same configuration profile settings page, but with the "Compliance" section expanded. The "Out of Route Threshold (miles)" field is visible and contains the value "0.2". The "FleetPortal Sync Intervals" section is collapsed, and the "Driver Accessibility" section remains collapsed.

Driver Accessibility

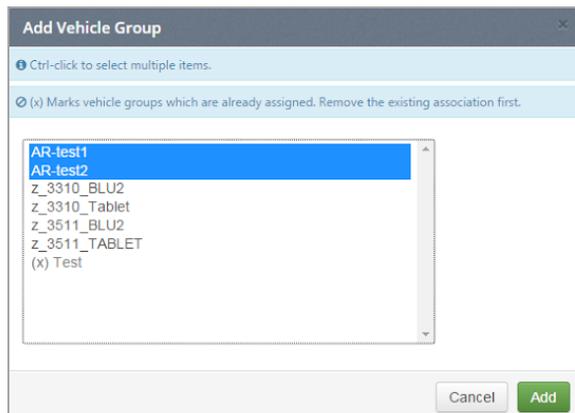
By default, CoPilot allows the driver to create and edit routing profiles in-cab. Additionally, with the latest Beta code, the driver is required to select a routing profile every time he/she generates a new route in-cab to help the driver remember to change profiles when appropriate (for example, picking up a hazmat load or switching to a different sized trailer).

Deselecting **Allow routing profile creation and editing** prevents driver creation and editing of routing profiles in-cab, limiting the drivers' selection to routing profiles created and assigned within FleetPortal.

Deselecting **Force routing profile selection** allows drivers to generate new routes in-cab without selecting a routing profile. In this case, CoPilot Truck will use whatever routing profile was last active for the new route unless the driver manually changes the routing profile.

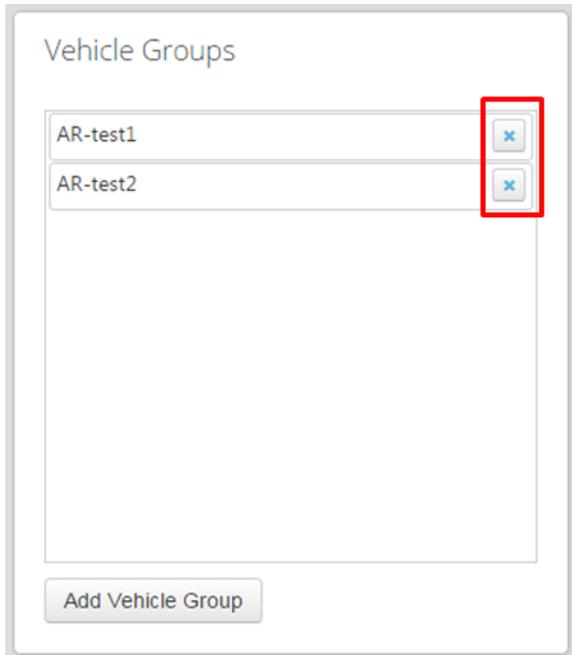
1.3. Assigning Configuration Profiles

Clicking **Add Vehicle Group** will open a pop up window with a list of all vehicle groups in your FleetPortal account. Ctrl-click to select multiple groups, then click **Add** to assign the Configuration Profile to them. As a reminder, only one Configuration Profile can be assigned to each vehicle group.



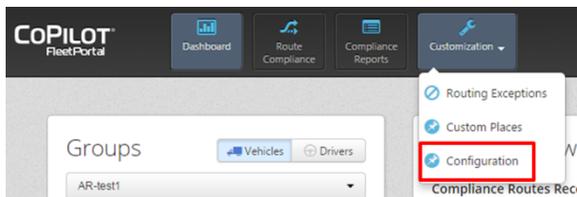
Note: vehicles can be part of multiple groups in the PeopleNet system. However, they can only have one active Configuration Profile at a time. It is therefore important not to assign different profiles to non-unique groups. If a vehicle is part of multiple groups that have been assigned different Configuration Profiles, then the vehicle will use the most recent profile it received.

To un-assign the Configuration Profile from a vehicle group, click the **x** to the right of the name of that vehicle group under the Vehicle Groups section.



2. Chapter 2: Creating, Editing, and Assigning Vehicle Routing Profiles

Routing Profiles are found in the Configuration option under the Customization tab.



There are three expandable sections on the left side of the screen. Open the Routing Profiles section to begin.



2.1. Creating Routing Profiles

The naming convention for your company's Routing Profiles is very important. This is what your drivers will be reading to select the correct routing profile every time they generate a new route in-cab.

Adding a new profile is simple – click the **+ Add Configuration Profile** button and enter the name of the new profile in the pop up.

2.2. Editing Routing Profiles

To edit an existing profile, select it from the list of profiles on the left. Once changes have been made, click **Save** to keep them.

To automatically apply this Routing Profile to vehicles in all newly created groups (as imported from PeopleNet) select **Use as Default for New Vehicle Groups** at the top of the settings section. Multiple profiles can be set as default Routing Profile(s) for new groups – in this case, all default Routing Profiles would be available for the driver to select from in-cab shortly after the new group was created.

General Routing Settings

This section manages a variety of routing modifiers, such as:

- Heavy Duty, Medium Duty, or Light Duty vehicle
- Least distance or most practical route
- Toll roads use
- Ferries use
- Crossing international borders
- State + National Network (Applies heavy favoring of US Federally designated National Network roads and state extensions to that network. Required for certain vehicle dimensions.)

Routing Profile Use as Default for New Vehicle Groups

Vehicle Type Name *

General

Routing Type Toll Roads

Use State + National Network Avoid Ferries International Borders Open

Restrictions

Vehicle Dimensions

Road Preferences

Restrictions

Many roads are designated as restricted for various hazardous materials. This section manages the hazardous materials restrictions, as well as how the map displays those restrictions to the driver.

Routing Profile Use as Default for New Vehicle Groups

Vehicle Type Name *

General

Restrictions

Hazmat Display Road Restrictions on Map

Avoid Propane-Restricted Tunnels

Vehicle Dimensions

Road Preferences

Vehicle Dimensions

Height, width, length, total weight, and max weight per axle group can also affect both road restrictions and how safe various maneuvers are even when the road itself is not officially restricted. Several standard Heavy Duty configurations are available in the Truck Dimensions drop down, but you are also able to enter in custom dimension configurations within the eligible ranges for the selected Vehicle Type. Selecting vehicle dimensions more than 48' long and/or more than 96" wide will cause the **State + National Network** configuration to be automatically applied.

Note: CoPilot Truck does not support permit-based over-dimensional routing at this point in time.

Routing Profile Use as Default for New Vehicle Groups

Vehicle Type ? Name *

General ▶

Restrictions ▶

Vehicle Dimensions ▼

Truck Dimensions ? Max Height ? ft in

Max Width (inches) ? Trailer/Straight Length ? ft in

Total Weight (pounds) ? Max Weight Per Axle Group (pounds) ?

Road Preferences ? ▶

Road Preferences

Meant for advanced users, the Road Preferences section allows you to manipulate how much various road types are avoided or favored compared to the standard CoPilot Truck routing algorithm. Additionally, you can change the average road speed by road type used for ETA calculations when this routing profile is active.

General ▶

Restrictions ▶

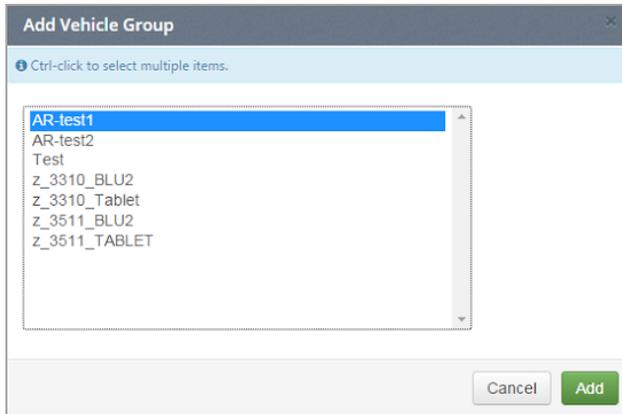
Vehicle Dimensions ▶

Road Preferences ? ▼

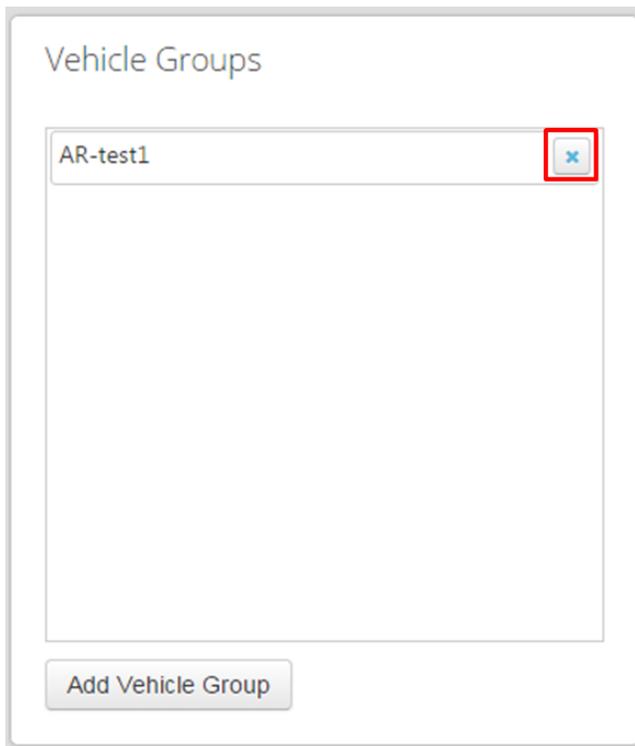
Freeways (Avoid/Favor) <input type="text" value="Neutral"/>	Freeways (Speed) <input type="text" value="50"/> mph
Divided Highways (Avoid/Favor) <input type="text" value="Neutral"/>	Divided Highways (Speed) <input type="text" value="27"/> mph
Primary Roads (Avoid/Favor) <input type="text" value="Neutral"/>	Primary Roads (Speed) <input type="text" value="18"/> mph
Secondary Roads (Avoid/Favor) <input type="text" value="Neutral"/>	Secondary Roads (Speed) <input type="text" value="14"/> mph
Local Streets (Avoid/Favor) <input type="text" value="Neutral"/>	Local Streets (Speed) <input type="text" value="9"/> mph

2.3. Assigning Routing Profiles

Clicking **Add Vehicle Group** will open a pop up window with a list of all vehicle groups in your FleetPortal account. Ctrl-click to select multiple groups, then click **Add** to add them to the profile. As a reminder, any number of routing profiles can be assigned to each vehicle group.



To un-assign a vehicle group from that Routing Profile, click the **x** to the right of the name of that vehicle group under the Vehicle Groups section.



3. Chapter 3: Managing Configuration and Routing Profiles by Vehicle Group

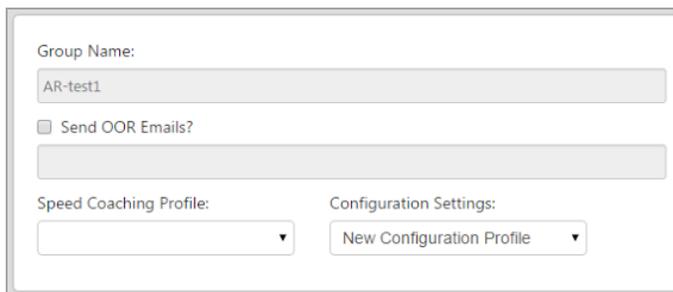
Both Configuration Profiles and Routing Profiles can be managed at the vehicle group level, assigning profiles to groups rather than groups to profiles. To access this, go to **Account** → **Account**

Settings next to Help in the upper right of the web page, then select **Manage Groups** in the Vehicle List section.

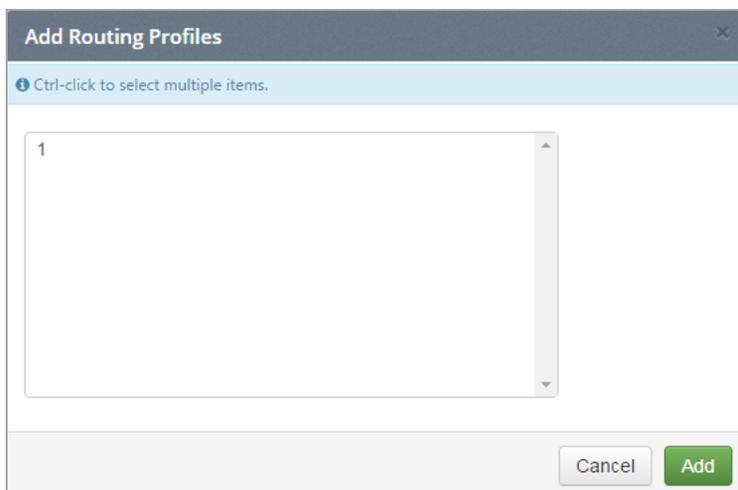


A list of vehicle groups for your account will be shown on the left. Select the vehicle group you wish to edit from this list.

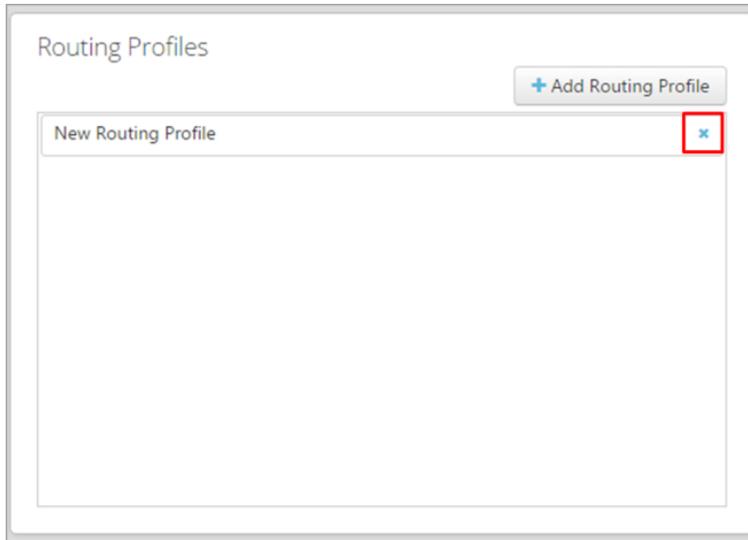
Select the Configuration Profile you wish to assign from the Configuration Profiles dropdown, or select the top blank line to remove all Configuration Profiles from the vehicle group.



Click the **+Add Routing Profile** button to open a list of all Routing Profiles not currently assigned to this vehicle group. Ctrl-click to select multiple routing profiles, then click **Add** to assign them to the vehicle group.



To un-assign a routing profile from that vehicle group, click the **x** to the right of the name of that routing profile under the Routing Profiles section.



4. Chapter 4: Introduction

4.1. What CoPilot FleetPortal Is

CoPilot FleetPortal is an Internet-based web portal that extends the functionality provided by the use of CoPilot Truck in your vehicles. As such, you can access CoPilot FleetPortal with an Internet browser anywhere you have access to the Internet.

4.2. The Core Features Available with CoPilot FleetPortal

CoPilot FleetPortal currently supports the following features:

- **Route Compliance** – visualization, reports, and analytics comparing planned route to actual path taken by your vehicles using CoPilot Truck.
- **Custom Places** – imported custom Points of Interest (POIs) that are then made available along with the default POIs within CoPilot Truck in your vehicles.
- **Custom Avoids and Favors** – imported Avoids/Favors from your back office PC*MILER instance that are then used to affect routes generated within CoPilot Truck in your vehicles.
- **Temporary road closures** – generate road closures directly within CoPilot FleetPortal that are then used to affect routes generated within CoPilot Truck in your vehicles.

4.3. CoPilot FleetPortal Browser Compatibility

CoPilot FleetPortal is optimized to work with the latest releases of Chrome, Internet Explorer, Firefox, and Safari. We recommend updating your system to the latest released versions to ensure optimal site performance.

5. Chapter 5: Route Compliance Overview

5.1. Route Compliance Components on CoPilot FleetPortal

There are three main tabs providing Route Compliance information on CoPilot FleetPortal:



- **Dashboard** – an overview of your fleet, with an overall summary of key data as well as several graphs showing performance indicators for your drivers and vehicles.
- **Route Compliance** – a map visualization of recorded routes plus an interactive table of data, all of which is able to be filtered by date and vehicle or driver.
- **Compliance Reports** – compliance data in a screen dedicated to the report output with the ability to print the results or export them in .csv format for later manipulation.

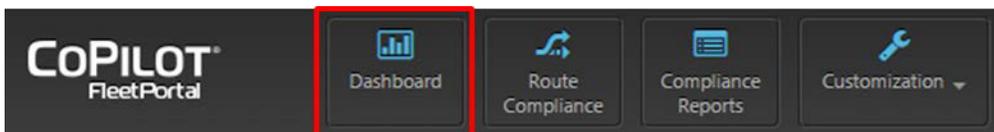
5.2. How Route Compliance Data is Generated

CoPilot Truck is ultimately what generates Route Compliance data. As long as Route Compliance is active in the vehicle, any RouteSync package received or route that is generated in-cab (prescribed route) will be used as the “planned” route. Then, as the vehicle moves, its GPS locations are used as the “actual” route. When the vehicle deviates from the planned route, CoPilot Truck records the GPS locations more frequently and can trigger an alert that passes through CoPilot FleetPortal. At the end of the trip, a Route Compliance package is sent from CoPilot Truck for back office reporting purposes.

By default, GPS is recorded every 5 minutes while following the planned route, and every 2 minutes while the vehicle is Out of Route.

Note: Route Compliance packages are recorded for each route run in CoPilot Truck, whether for a single leg of a trip (to a single destination) or for the entire planned trip (to a series of stops).

6. Chapter 6: Route Compliance Dashboard Tab



6.1. Components of the Dashboard Tab

The screenshot shows the CoPilot FleetPortal dashboard interface. At the top, there is a navigation bar with the CoPilot logo and several menu items: Dashboard, Route Compliance, Compliance Reports, and Customization. On the right side of the navigation bar, it displays 'ALK Fleet', the user email 'bnimchuk@alk.com', and links for Account and Help.

Callout 6.2 points to the 'Groups' section, which includes a dropdown menu currently set to 'Main' and buttons for 'Vehicles' and 'Drivers'. Callout 6.3 points to the 'Summary' section, which displays key metrics for 'ALK Fleet': Total Vehicles (45), Average OOR Miles (13.36 mi), Average OOR Time (2 hr, 18 min), Maximum OOR Miles (1564.5 mi), and Maximum OOR Time (565 hr, 55 min). Callout 6.4 points to the 'Device Versions' section with a 'Download' link. Callout 6.5 points to the 'Data Overview' section, which contains four charts: 'Compliance Routes Received (by week)' (line chart), 'Percent of OOR Miles (by Vehicle)' (horizontal bar chart), 'Percent of Routes with OOR Events' (pie chart), and 'Ratio of OOR Miles (by week)' (stacked bar chart).

*OOO: Out of Route

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6.2. Groups Section

This section controls the data that populates the rest of the Dashboard tab. You can choose to look at the Summary and Data Overview data by group or groups of vehicles or drivers. To do so, first select which type of group you want to filter by – vehicles (default) or drivers.

The drop down list will display all groups of that type (vehicles or drivers) within the account. You can select a single group by clicking on it. Alternatively, you can select multiple groups by clicking and dragging to select a series of groups or by holding Control (Ctrl) down and clicking each individual group you want to add to the data shown on the Dashboard tab.

Note: group information is imported automatically from the telematics partner. To change the grouping available within CoPilot FleetPortal, you must update your groups within their system first.

6.3. Summary Section

This section displays some basic information about the group of vehicles or drivers you have filtered to in the Groups section. This includes:

- **Total Vehicles / Drivers** – the total number of vehicles or drivers in the group(s) you have selected in the Groups section.
- **Average OOR Miles** – the average number of Out of Route miles, calculated as the discrepancy in planned vs. actual distance for the route, for all the legs and trips recorded for the selected group(s).
- **Average OOR Time** – the average amount of Out of Route time, calculated as the discrepancy in planned vs. actual time to run the route, for all the legs and trips recorded for the selected group(s).
- **Maximum OOR Miles** – the maximum number of Out of Route miles out of all the legs and trips recorded for the selected groups(s).
- **Maximum OOR Time** – the maximum amount of Out of Route time out of all the legs and trips recorded for the selected group(s).

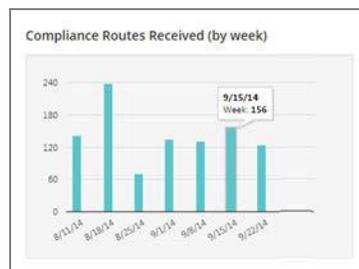
6.4. Device Versions section

This section consists of a link that exports to .csv format a list of all vehicles and the last reported CoPilot Truck application and map data version.

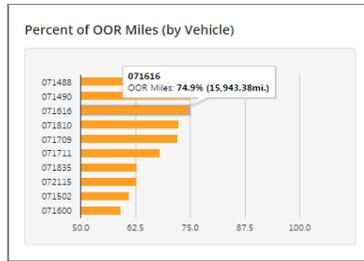
- **Deviceld** – the Device ID is the unique device identifier, such as DSN or Device Serial Number, as defined by the telematics partner.
- **ScreenName** – the vehicle number, as set by you within the telematics partner's system.
- **ApplicationVersion** – the CoPilot Truck software version number as last reported by the vehicle.
- **MapVersion** – the CoPilot Truck map data version number as last reported by the vehicle.

6.5. Data Overview Section

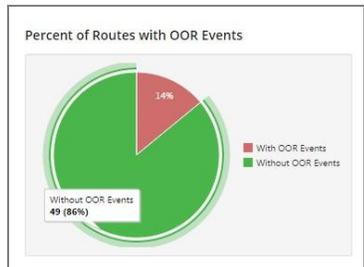
This section provides graphical views of four key performance indicators for your fleet. Each data element in the graph will provide additional information when you hover over it with your mouse, including the exact value of the data point.



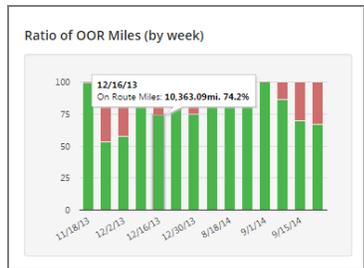
Compliance Routes Received (by week) – the total number of Route Compliance packages received from the vehicles or drivers in the group(s) you have selected in the Groups section, broken down by one week periods. The previous seven (7) weeks are shown. Additional data includes both the specific week and the number of Route Compliance packages received that week.



Percent of OOR Miles (by vehicle/driver) – the 10 vehicles or drivers within the selected group(s) that have the highest percentage of Out of Route miles, in order of worst to best. This is based on all historical Route Compliance data. Out of Route miles are defined as the discrepancy in planned vs. actual distance for the route. Additional data includes both exact percentage of Out of Route miles and the distance that represents.

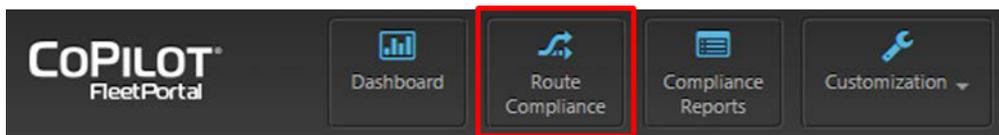


Percent of Routes with OOR Events – a pie chart showing the overall percentage of Route Compliance packages from the selected group(s) that had Out of Route events vs. those that did *not* have Out of Route events. This is based on all historical Route Compliance data. Additional data includes both the percentage of Out of Route events and the number of Route Compliance packages that represents.



Ratio of OOR Miles (by week) – a bar chart showing the percentage of miles driven on route (green) vs. Out of Route (red) within all of the Route Compliance packages received from the selected group(s). The previous seven (7) weeks are shown. Additional data includes both the specific week, the percentage of on-route or Out of Route miles for that week, and the total number of miles that represents.

7. Chapter 7: Route Compliance Tab



7.1. Components of the Route Compliance Tab

The screenshot displays the CoPilot FleetPortal interface. The top navigation bar includes 'Dashboard', 'Route Compliance', 'Compliance Reports', and 'Customization'. The user is logged in as 'ALK Fleet' with email 'bnimchuk@alk.com'. The left sidebar contains 'Vehicle Groups' (7.2) with a dropdown set to 'All Active' and 'Select' buttons for 'Vehicles' and 'Drivers'. Below this is the 'Filter Selection' panel (7.3) with a search filter, a 'Hide vehicles with no routes' checkbox, and a list of vehicle IDs (1074, 1087, 1119, 1120, 1197, 1200, 1201, 1202, 1210) with their respective counts. The central map (7.4) shows a route from Minneapolis to Chicago. The bottom table (7.5) is titled 'Actual and Planned Routes' and shows 10 records of route data.

Id	Start	End T.	Origin	Desti.	Plann.	Actual	Dista.	Plann.	Actual	Durati.	OOR	OOR
1087 (...)	9/25/1	9/25/1	Frankli...	Kenos...	24.23	23.26	-1	00:41	01:28	+00:47	0.05	\$0.04
1200 (...)	9/25/1	9/25/1	Walcot...	Pella, IA	146.59	148.09	1.5	02:52	02:56	+00:03	--	--
1200 (...)	9/25/1	9/25/1	Walcot...	Pella, IA	146.59	--	--	02:52	--	--	--	--
1087 (...)	9/24/1	9/24/1	Kenos...	Pontia...	142.22	139.49	-2.7	02:59	02:36	-00:22	0.56	\$0.45
1200 (...)	9/24/1	9/25/1	Norma...	Walcot...	152.19	163.66	11.5	02:51	13:53	+11:01	20.28	\$16.22
1087 (...)	9/24/1	9/24/1	Frankli...	Kenos...	24.23	23.24	-1	00:41	01:20	+00:39	0.05	\$0.04
1201 (...)	9/24/1	9/25/1	Fargo...	Edinbu...	865.79	868.25	2.5	14:53	1 04:04	+13:10	24.98	\$19.98
1087 (...)	9/23/1	9/23/1	Kenos...	Pontia...	142.21	138.8	-3.4	02:59	02:53	-00:06	0.55	\$0.44
1087 (...)	9/23/1	9/23/1	Frankli...	Kenos...	24.23	23.27	-1	00:41	00:39	-00:01	0.08	\$0.06

7.2. Vehicle/Driver Groups

This section controls the data that populates the rest of the Route Compliance tab. You can choose to look at the actual and planned routes data by group or groups of vehicles or drivers. To do so, first select which type of group you want to filter by – vehicles (default) or drivers.

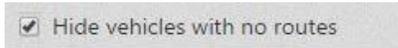
The drop down list will display all groups of that type (vehicles or drivers) within the account. You can select a single group by clicking on it. Alternatively, you can select multiple groups by clicking and dragging to select a series of groups or by holding Control (Ctrl) down and clicking each individual group you want to add to the data shown on the Route Compliance tab.

Note: group information is imported automatically from the telematics partner. To change the grouping available within CoPilot FleetPortal, you must update your groups within their system first.

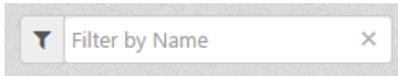
7.3. Filter Selection

You can further refine your filter by removing or adding back individual or multiple vehicles or drivers from the selected group(s). The same single and multi-select tools exist here. You can select or deselect a single vehicle or driver by clicking on it. Alternatively, you can select multiple vehicles or drivers by clicking and dragging to select a series of them or by holding Control (Ctrl) down and clicking each individual vehicle or driver you want to select or deselect.

By default, the **Hide vehicles with no routes** option is checked and active.



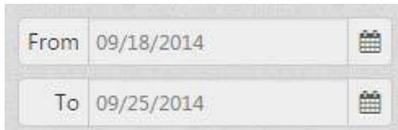
You can **Filter by Name** to quickly find specific vehicles or drivers you want to report on.



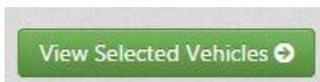
You can also **Select All** or **Deselect All** by clicking on the appropriate button.



Once you have selected the vehicles or drivers whose Route Compliance events you want to view, you should refine your filter further by selecting a **start date** and **end date**. The default range is the last 7 days.



Then, click on the **View Selected Vehicles** button to visualize on the map and display the associated Route Compliance report.



7.4. Map Visualization

This section is the visualization on a map of the Route Compliance data detailed in the visible rows of the linked table. The table shows up to 25 routes at a time. The map visualization by default displays all 25 routes, each with its own color matching the row in the table. The map starts out centered on the routes, automatically zoomed in to show all 25 routes.

To expand the map further, you can click the **Hide** button to minimize the Actual and Planned Routes table or click the ← button to minimize the Groups and Filter sections.

7.4.1. Map Legend

The **Map Legend** can be expanded by clicking on the  sign. This explains the different symbols used on the map:

-  **Planned Route** – the original prescribed route either generated by CoPilot Truck or from a RouteSync package. This will match the color of the corresponding table row.
-  **Actual Route** – the actual route taken by the driver as defined by GPS breadcrumbs recorded while the route was active. This will match the color of the corresponding table row. **Note:** *the map will display straight lines between GPS points in order to provide an efficient service.*
-  **Route Origin** – the starting point of the planned route, typically where the vehicle was when the route was generated. Clicking on this icon on the map will pop up a callout with additional information about the Route Origin event.
-  **Route Destination** – the ending point of the planned route. In multi-stop routes, this is the last stop of the trip. Clicking on this icon on the map will pop up a callout with additional information about the Route Destination event.
-  **Left Planned Route** – where the vehicle left the prescribed route beyond the defined distance threshold. This will match the color of the corresponding table row. Clicking on this icon on the map will pop up a callout with additional information about the Left Planned Route event.
-  **Rejoined Planned Route** – where the vehicle came back to the prescribed route. This will match the color of the corresponding table row. Clicking on this icon on the map will pop up a callout with additional information about the Rejoined Planned Route event.

7.4.2. Map Zoom and Pan



Each click of the **Pan** button directional arrows moves the map view in that direction by 10% of the visible area. You can also hold down the Control (Ctrl) button and press the directional keys on your keyboard to pan.



The **Zoom** bar can be used to zoom the map view in and out. You can click the **+** and **-** buttons to zoom in and out one level at a time. You can also hold down the Control (Ctrl) button and press the **+** and **-** keys on your keyboard. Alternatively, you can click the slider and drag it to the desired zoom level or click on the slider bar to go directly to a specific zoom level.

7.4.3. Map Quick Tools

The map tools are used to interact with the map, quickly panning or zooming to the desired level and gathering additional information about the visualization itself.



-  **Hand Tool** – when selected you can grab and drag the map view around to the desired position. This is the default behavior when you just click an open space on the map and drag it.
-  **Zoom Box** – when selected you can click one point on the map, drag to a second point on the map, and zoom in to the area within the box you just created.
-  **Previous Map View** – acts as an “undo” button, sending you back to the map location and zoom level you were previously looking at. *For example, if you had zoomed in once, then panned to the North, then zoomed in a second time, pressing the Previous Map View button would act as an “undo”, removing the second zoom in action.*
-  **Next Map View** – acts as a “redo” button, sending you forward if you had just used the *Previous Map View* button. *For example, if you had zoomed in once, then panned to the North, then zoomed in a second time, pressing the Previous Map View button would act as an “undo”, removing the second zoom in action. Subsequently pressing the Next Map View button would act as a “redo”, replacing the second zoom in action.*
-  **Information Tool** – when selected, you can click on a map data item such as *Rejoined Planned Route* to get more information about that data item. This is the default behavior when you click on a data point on the map.

7.5. Linked Route Compliance Data Table

The data table provides visibility to details about the routes visualized on the map. In addition, there are some controls that help you to find and review routes of interest.

7.5.1. Map Controls in Linked Table

There are three controls that affect the route visualization on the linked map.

-  **Show / Hide Routes** – you can show or hide individual routes by clicking the  icon on the individual row. When a route is hidden, the data in that row is greyed out and you are prevented from zooming to it on the map. To show or hide all routes, click the  icon at the top of the column. **Tip:** to isolate a single route on the map, first hide all routes and then click the  icon to display the one route you want to see.
-  **Center on Route** – you can center the map, automatically zooming in and panning to an individual route by clicking the  icon on the individual row. To center on all routes, click the  icon at the top of the column.
-  **Snap to Road** – By default, the actual path taken by the driver consists of a series of straight lines between GPS points when Out of Route in order to provide an efficient service. Clicking  the icon will snap the actual route to the road network, based on practical route.

Note: this may not show the exact roads the driver took between reported GPS locations – this is a practical route calculation done by CoPilot FleetPortal using PC*MILER algorithms to fill the gaps between the 2 minute GPS recordings.

7.5.2. Data Definitions

These are the definitions for each of the columns in the table output.

- **ID** – the vehicle or driver name associated with the Route Compliance package.
- **Start Time** – date and time (M/DD/YY H:MM) at which the route was generated in-cab or the RouteSync package was received and processed to become the active route.
- **End Time** – date and time (M/DD/YY H:MM) at which the active route was completed by arriving at the final destination. **Note:** this will be blank if the driver cancelled the trip before completing it.
- **Origin** – the starting point of the planned route, typically where the vehicle was when the route was generated. This is shown as street address or as near a major road plus the state if the GPS location does not translate to a known address.
- **Destination** – the ending point of the planned route. In multi-stop routes, this is the last stop of the trip. This is shown as the street address of the destination.
- **Planned Distance** – the distance in miles, to the nearest hundredth, of the planned route.
- **Actual Distance** – the distance in miles, to the nearest hundredth, of the actual path taken by the driver between route creation (**Start Time**) and arriving at the last stop of the trip (**End Time**). If the driver cancelled the route before completing it, an alert icon  will be shown in this column along with any distance the driver accumulated prior to cancelling the active route.

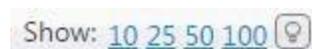
- **Distance Delta** – the difference between **Planned Distance** and **Actual Distance** in miles, to the nearest hundredth. [Actual Distance] – [Planned Distance] = [Distance Delta]
- **Planned Duration** – the estimated drive time of the planned route in days, hours, and minutes (dd hh:mm), based on historical average road speeds of the road segments used in the prescribed route.
- **Actual Duration** – the actual time it took to complete the route, between route creation and arriving at the last stop of the trip, in days, hours, and minutes (dd hh:mm). **Note: this includes non-drive time.**
- **Duration Delta** – the difference between **Planned Duration** and **Actual Duration** in days, hours, and minutes (dd hh:mm). [Actual Duration] – [Planned Duration] = [Duration Delta]
- **OOR Distance** – the number of miles, to the nearest hundredth, that the driver was driving Out of Route. Note that, while **Actual Distance** is measuring the total distance of the path taken, **OOR Distance** is measuring how closely the driver adhered to the planned route. **Note: fleets requiring strict adherence to the prescribed roads for safety (e.g. Hazmat) or other business reasons should leverage this metric more than Distance Delta to ensure full compliance.**
- **OOR Cost** – the estimated cost of driving Out of Route. The cost multiplier is set in **Account Settings** for the account. [OOR Distance] * [Cost Per Mile] = [OOR Cost]

7.5.3. Change Table Display

You can change the width of individual columns by hovering your mouse over the divider between column names until the pointer changes to an  icon. Then click and drag the divider until the column is the desired width.

You can also change the order of columns by clicking and dragging the column name to the desired position.

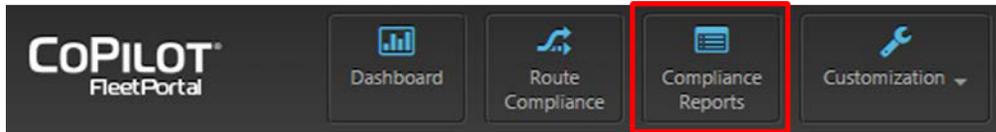
Clicking the light bulb icon allows you to change the number of rows displayed in the table and therefore also the number of routes displayed in the map visualization.



Finally, you can sort the table output by clicking on the column name by which you want to sort. This will sort the table output alphanumerically (0-9, a-z). Clicking the column name a second time will sort the table output in reverse alphanumeric order (z-a, 9-0). To remove all sorting, you will need to re-run the results by clicking the **View Selected Vehicles** button.



8. Chapter 8: Compliance Reports Tab



8.1. Components of the Compliance Reports Tab

Id	Start Time	End Time	Origin	Destination	Planned Di.	Actual Dist.	Distance D.	Planned D.	Actual Dur.	Duration D.	OOR Dist.	OOR Cost
202 (154)	9/21/14 2:	9/22/14 7:	North 20th	Grand Isla	441.74	444.31	2.6	09:37	16:57	+07:20	7.24	\$5.79
1087 (3842)	9/19/14 6:	9/19/14 9:	Near 95th	Pontiac, IL	142.22	141.44	-0.8	02:59	02:31	-00:28	0.56	\$0.45
201 (154)	9/19/14 6:	9/20/14 6:	1689 North	120 Jeffers	113.39	113.08	-0.3	03:09	02:31	-00:38	0.12	\$0.1
1087 (3842)	9/19/14 5:	9/19/14 6:	Near South	5713 95th	24.7	23.21	-1.5	00:43	00:31	-00:11	0.01	\$0.01
200 (154)	9/19/14 4:	9/19/14 5:	I-39, US-5	115 Hwy 9	40.48	38.59	-1.9	01:26	00:53	-00:32	0.12	\$0.1
202 (154)	9/19/14 11:	...	Hubbard A.	Cedar Stre	85.35	...	...	...	01:58	...	...	...
197 (154)	9/18/14 8:	9/19/14 9:	Milton, WI	3507 East	8.28	8.67	0.4	00:09	00:17	+00:08	0.17	\$0.14
1087 (3842)	9/18/14 6:	9/18/14 9:	95th Aven.	Pontiac, IL	142.22	140.38	-1.8	02:59	02:34	-00:25	0.55	\$0.44
1087 (3842)	9/18/14 4:	9/18/14 6:	Near South	5713 95th	24.23	23.19	-1	00:41	00:30	-00:10	0.09	\$0.07
202 (154)	9/18/14 2:	9/19/14 6:	I-80 Gresh	East Peoria	414.02	414.6	0.6	07:04	17:34	+10:30	0.34	\$0.27
197 (154)	9/18/14 10:	...	40th Stree	Dickinson, ...	292.73	...	...	...	05:13	...	...	...
197 (154)	9/18/14 10:	...	40th Stree	Minot, ND	262.38	...	...	...	05:48	...	...	...
1087 (3842)	9/17/14 6:	9/17/14 6:	Near 95th	Pontiac, IL	142.22	3881.8	3739.6	02:59	02:31	-00:27	0.56	\$0.45
1087 (3842)	9/17/14 4:	9/17/14 6:	Near South	5713 95th	24.23	23.28	-1	00:41	00:38	-00:02	0.08	\$0.06
201 (154)	9/17/14 4:	9/19/14 12:	North Peac.	500 North	1045.31	1049.28	4	19:37	1 19:28	+23:50	32.6	\$26.08
200 (154)	9/17/14 12:	9/18/14 6:	North Peac.	1070 East	820.95	6107.49	5286.5	14:08	1 05:36	+15:27	8.5	\$6.8
197 (154)	9/17/14 12:	9/17/14 2:	Near US 8	Dickinson, ...	122.23	121.96	-0.3	03:04	02:30	-00:34	3.81	\$3.05
200 (154)	9/17/14 11:	9/17/14 12:	Ridgecrest	510 North	44.43	44.15	-0.3	00:52	00:54	+00:01	...	...
1087 (3842)	9/16/14 7:	9/16/14 10:	Near 95th	Pontiac, IL	142.22	140.92	-1.3	02:59	02:35	-00:24	0.53	\$0.42
1087 (3842)	9/16/14 5:	9/16/14 7:	Near South	5713 95th	24.23	23.25	-1	00:41	00:38	-00:02	0.07	\$0.06
197 (154)	9/16/14 12:	9/16/14 2:	North 17th	Minot, ND	209.25	5.03	-204.2	05:07	01:08	-03:58	...	...
1087 (3842)	9/15/14 6:	...	Near 95th	Pontiac, IL	142.22	...	...	...	02:59	...	0.54	\$0.43
1087 (3842)	9/15/14 4:	9/15/14 6:	Near South	5713 95th	24.23	23.25	-1	00:41	00:42	+00:01	0.08	\$0.06
200 (154)	9/15/14 3:	...	300 Ransd.	Joe Ramse	872.95	...	...	...	14:56	...	9.74	\$7.79
197 (154)	9/15/14 2:	...	North Main	1802 12th	669.54	...	...	...	11:49	...	...	...
200 (154)	9/15/14 1:	9/15/14 2:	Lebanon, IN	4097 Joe R.	871.77	1.55	-870.2	14:57	00:32	-14:24	...	...
201 (154)	9/15/14 10:	9/17/14 11:	Near Dakw.	Holt Way S.	1245.46	1243.34	-2.1	23:06	2 03:00	+1 03:53	24.77	\$19.82
197 (154)	9/14/14 9:	...	South 22n.	North Radd	264.17	...	...	...	04:37	...	...	...
201 (154)	9/14/14 7:	...	Near US 2	9840 Sout.	729.58	...	...	...	12:50	...	...	...
201 (154)	9/13/14 10:	...	US-22, US-	9800 Sout.	729.55	...	...	...	12:50	...	...	...
1087 (3842)	9/12/14 7:	9/12/14 10:	Near 95th	Pontiac, IL	142.22	138.98	-3.2	02:59	02:58	-00:01	0.54	\$0.43
1087 (3842)	9/12/14 4:	9/12/14 7:	Near South	5713 95th	24.23	23.27	-1	00:41	00:39	-00:01	0.05	\$0.04
212 (155)	9/12/14 12:	9/13/14 10:	Northwest	647 South	1704.43	348.68	-1355.8	1 07:21	10:54	-20:27	168.28	\$134.62

8.2. Vehicle/Driver Groups

This section controls the data that populates the rest of the Compliance Reports tab. You can choose to look at the actual and planned routes data by group or groups of vehicles or drivers. To do so, first select which type of group you want to filter by – vehicles (default) or drivers.

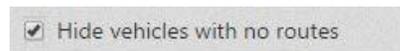
The drop down list will display all groups of that type (vehicles or drivers) within the account. You can select a single group by clicking on it. Alternatively, you can select multiple groups by clicking and dragging to select a series of groups or by holding Control (Ctrl) down and clicking each individual group you want to add to the data shown on the Route Compliance tab.

Note: group information is imported automatically from the telematics partner. To change the grouping available within CoPilot FleetPortal, you must update your groups within their system first.

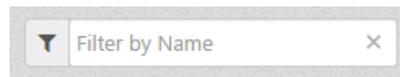
8.3. Filter Selection

You can further refine your filter by removing or adding back individual or multiple vehicles or drivers from the selected group(s). The same single and multi-select tools exist here. You can select or deselect a single vehicle or driver by clicking on it. Alternatively, you can select multiple vehicles or drivers by clicking and dragging to select a series of them or by holding Control (Ctrl) down and clicking each individual vehicle or driver you want to select or deselect.

By default, the **Hide vehicles with no routes** option is checked and active.



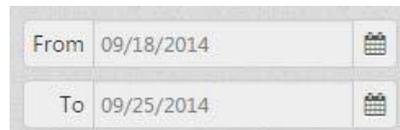
You can **Filter by name** to quickly find specific vehicles or drivers you want to report on.



You can also **Select All** or **Deselect All** by clicking on the appropriate button.



Once you have selected the vehicles or drivers whose Route Compliance events you want to view, you should refine your filter further by selecting a **start date** and **end date**. The default range is the last 7 days.



Then, click on the **View Selected Vehicles** button to display the Route Compliance report.



8.4. Compliance Reports Section

This is the actual report output for all the detailed Route Compliance data for the selected vehicles or drivers during the selected timeframe, paginated for improved performance. There are also export and print options for the data.

8.4.1. Compliance Report Data Definitions

These are the definitions for each of the columns in the report output.

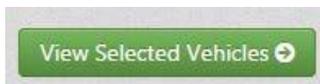
- **ID** – the vehicle or driver name associated with the Route Compliance package.
- **Start Time** – date and time (M/DD/YY H:MM) at which the route was generated in-cab or the RouteSync package was received and processed to become the active route.
- **End Time** – date and time (M/DD/YY H:MM) at which the active route was completed by arriving at the final destination. **Note:** *this will be blank if the driver cancelled the trip before completing it.*
- **Origin** – the starting point of the planned route, typically where the vehicle was when the route was generated. This is shown as street address or as near a major road plus the state if the GPS location does not translate to a known address.
- **Destination** – the ending point of the planned route. In multi-stop routes, this is the last stop of the trip. This is shown as the street address of the destination.
- **Planned Distance** – the distance in miles, to the nearest hundredth, of the planned route.
- **Actual Distance** – the distance in miles, to the nearest hundredth, of the actual path taken by the driver between route creation (**Start Time**) and arriving at the last stop of the trip (**End Time**). If the driver cancelled the route before completing it, an alert icon  will be shown in this column along with any distance the driver accumulated prior to cancelling the active route.
- **Distance Delta** – the difference between **Planned Distance** and **Actual Distance** in miles, to the nearest hundredth. [Actual Distance] – [Planned Distance] = [Distance Delta]
- **Planned Duration** – the estimated drive time of the planned route in days, hours, and minutes (dd hh:mm), based on historical average road speeds of the road segments used in the prescribed route.
- **Actual Duration** – the actual time it took to complete the route, between route creation and arriving at the last stop of the trip, in days, hours, and minutes (dd hh:mm). **Note:** *this includes non-drive time.*
- **Duration Delta** – the difference between **Planned Duration** and **Actual Duration** in days, hours, and minutes (dd hh:mm). [Actual Duration] – [Planned Duration] = [Duration Delta]
- **OOR Distance** – the number of miles, to the nearest hundredth, that the driver was driving Out of Route. Note that, while **Actual Distance** is measuring the total distance of the path taken, **OOR Distance** is measuring how closely the driver adhered to the planned route. **Note:** *fleets requiring strict adherence to the prescribed roads for safety (e.g. Hazmat) or other business reasons should leverage this metric more than Distance Delta to ensure full compliance.*
- **OOR Cost** – the estimated cost of driving Out of Route. The cost multiplier is set in **Account Settings** for the account. [OOR Distance] * [Cost Per Mile] = [OOR Cost]

8.4.2. Change Report Display

You can change the width of individual columns by hovering your mouse over the divider between column names until the pointer changes to an  icon. Then click and drag the divider until the column is the desired width.

You can also change the order of columns by clicking and dragging the column name to the desired position.

Finally, you can sort the report output by clicking on the column name by which you want to sort. This will sort the report output alphanumerically (0-9, a-z). Clicking the column name a second time will sort the report output in reverse alphanumeric order (z-a, 9-0). To remove all sorting, you will need to re-run the report by clicking the **View Selected Vehicles** button.



8.4.3. Export Options

To export the report as a .csv file for further manipulation, click the **CSV** button. The report output will save to your default download location.



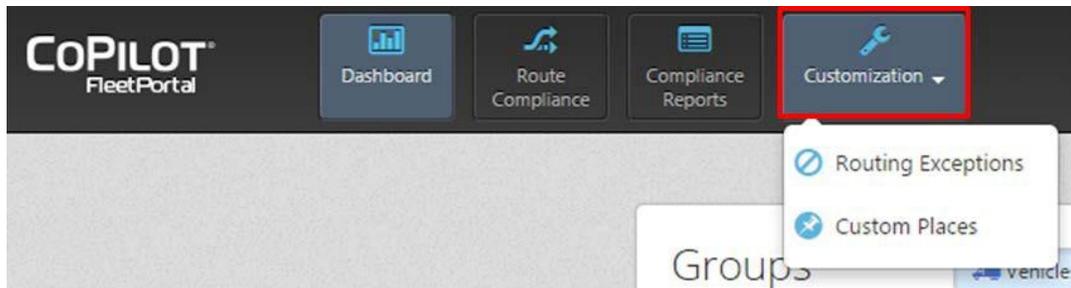
To print the report, click the **Print** button. The report will automatically size to fit the width of the paper you select within your browser's print function.



9. Chapter 9: Customization Overview

9.1. Customization Components on CoPilot FleetPortal

There are two sub-tabs on CoPilot FleetPortal which allow customization of in-cab routes and points of interest:

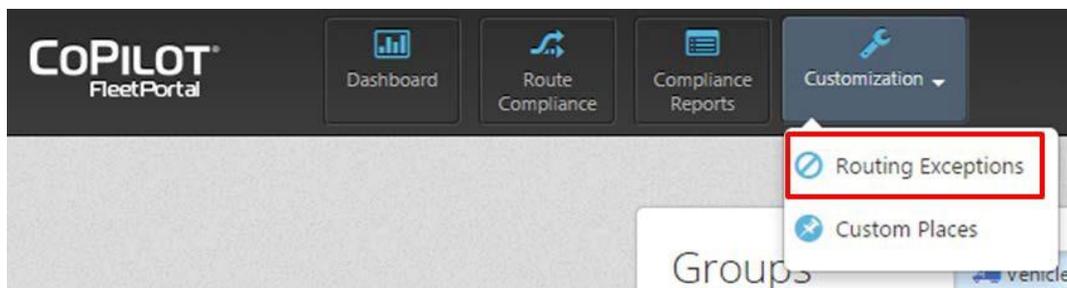


- **Routing Exceptions** – manually create temporary road closures directly within CoPilot FleetPortal or import your avoids / favors set from PC*MILER. These routing exceptions will affect all routes generated in CoPilot Truck. **Note:** *RouteSync routes are generated in PC*MILER and therefore will not be affected by in-vehicle CoPilot Truck routing exceptions. Even if the driver leaves the prescribed route, CoPilot Truck will reroute leveraging only the routing exceptions defined within the RouteSync package.*
- **Custom Places** – import custom points of interest (POIs) for driver browsing and selection in CoPilot Truck.

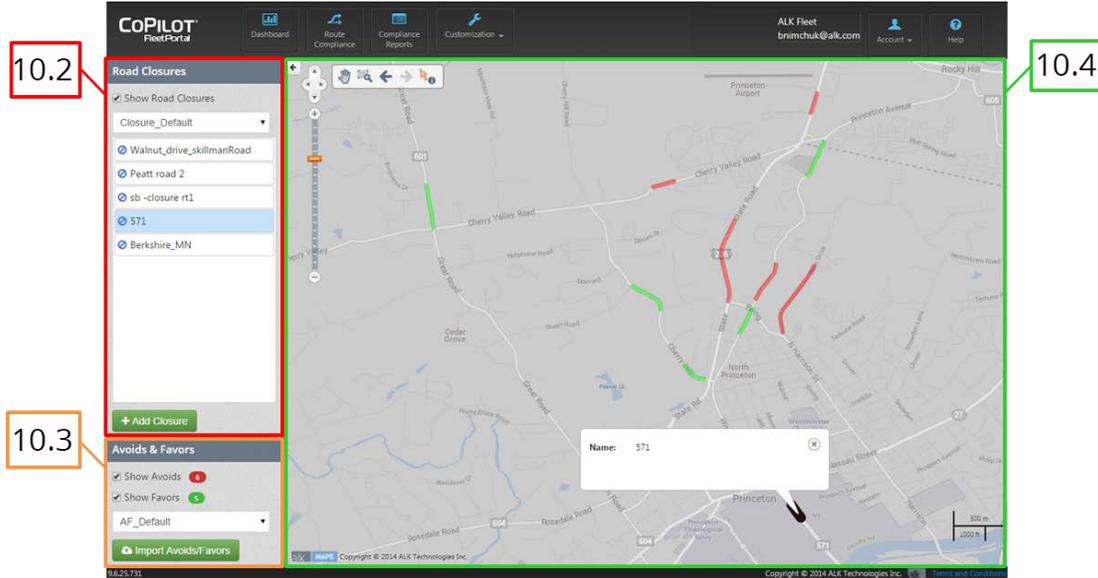
9.2. How Customization Data is Delivered to the Vehicle

The CoPilot Truck application controls the synchronization of Customization data from the vehicle. As long as the code version supports Routing Exceptions and Custom Places, CoPilot Truck will periodically poll CoPilot FleetPortal, checking to see if there are any updates available. Once an update is found, CoPilot Truck will request the data be sent from CoPilot FleetPortal. Upon delivery, CoPilot Truck will update its Routing Exceptions and Custom Places files. Non-RouteSync routes will be recalculated immediately upon delivery of Routing Exceptions.

10. Chapter 10: Routing Exceptions



10.1. Components of the Routing Exceptions Page



10.2. Road Closures

Road Closures are temporary restrictions for specific road segments that are created directly within CoPilot FleetPortal. They act much like Avoids that are created in PC*MILER, causing CoPilot Truck to avoid using that road segment when generating routes. Some fleets leverage Road Closures to avoid short term construction projects or poorly maintained roads immediately after a heavy snowfall.

10.2.1. Create New Temporary Road Closure in CoPilot FleetPortal

To create a new Road Closure, click on the **+ Add Closure** button.



Then, click on the road segment on the map that will receive the temporary Road Closure designation. Be sure to zoom in sufficiently on the map to select the correct road segment.

A pop-up dialogue box will appear.

Add Closure

Select a set:
Closure_Default

Closure Name:

Cancel Add

Select the Road Closure set name of which this temporary Road Closure will become a part. Enter in the name for the specific Road Closure. **Note:** *this name is what displays in the list of Road Closures on CoPilot FleetPortal. Using a unique and easily recognizable name will help when managing large sets of Road Closures. Adding a target date for review or deletion will help avoid persisting outdated Road Closures.*

Click on the **Add** button to create the new Road Closure, or click on **Cancel** to exit the dialogue without saving the new Road Closure.

10.2.2. Toggle Road Closures Visualization Off / On

Temporary Road Closures appear as thick black lines on the map visualization, covering the specific road segments that are affected. To hide temporary Road Closures from the map view, deselect the check box next to **Show Road Closures**.



10.2.3. Select Road Closures Set to View on Map

Select the temporary Road Closure from the list of Road Closures you wish to see on the map by clicking on its name.



The map view will automatically zoom to show that specific road segment, and will pop up a callout with the Road Closure name.



10.3. Avoids & Favors

Avoids and Favors are routing modifiers that are defined and managed within PC*MILER. Avoids effectively remove the designated road segment from the routes generated, while Favors increase the likelihood of using that road segment. Together, Avoids and Favors can be used to shape the routes generated both in PC*MILER and, when imported to CoPilot FleetPortal, the routes generated in-cab by CoPilot Truck.

The specific file that defines Avoids and Favors in PC*MILER is **flattened_af.dat**

10.3.1. Exporting Avoids & Favors Set from PC*MILER 27

To export your Avoids and Favors set from PC*MILER 27, navigate in the file system to `C:\ALK Technologies\PMW270\NA\Q1\Save` and copy the **flattened_af.dat** file. Paste this in a different location that you can easily navigate to during the import process, like the Desktop.

10.3.2. Exporting Avoids & Favors Set from PC*MILER 28

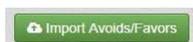
By default, PC*MILER 28 maintains the Avoids and Favors set in a .db (SQL Lite) format. To change to the .dat format, first edit the **user.cfg** file in the application folder and add the following under **User Settings**:

```
[User Settings]
"FlattenAvoidFavors"=1
```

Once the configuration file has been updated, start PC*MILER and the application will create your Avoids and Favors in the .dat format. Now that the Avoids and Favors are in the correct format, navigate in the file system to `C:\ALK Technologies\PMW270\NA\Q1\Save` and copy the **flattened_af.dat** file. Paste this in a different location that you can easily navigate to during the import process, like the Desktop.

10.3.3. Importing Avoids & Favors Set into CoPilot FleetPortal

To import an Avoids and Favors set, click on the **Import Avoids/Favors** button.



A pop up box will appear.



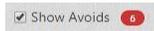
Click on the **Choose File** button to find the **flattened_af.dat** file that contains your Avoids and Favors set from PC*MILER.

If you already have an Avoids and Favors set imported into CoPilot FleetPortal, the new set you import will overwrite the existing set.

Finally, click the **Import** button to import the Avoids and Favors set.

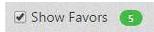
10.3.4. Toggle Avoids Visualization Off / On

Avoids are shown as thick red road segments. By default, Avoids are shown on the map visualization. To stop showing Avoids on the map, uncheck the box next to **Show Avoids**. Check the box next to **Show Avoids** to show Avoids on the map again.



10.3.5. Toggle Favors Visualization Off / On

Favors are shown as thick green road segments. By default, Favors are shown on the map visualization. To stop showing Favors on the map, uncheck the box next to **Show Favors**. Check the box next to **Show Favors** to show Favors on the map again.



10.4. Map Visualization

This section is the visualization on a map of the Routing Exceptions associated with the selected Road Closures set(s) and the Avoids and Favors set currently imported into FleetPortal. Road Closures are shown as thick black road segments. Avoids are thick green road segments, while Closures are thick red road segments.

To expand the map further, you can click the ← button to minimize the Road Closures and Avoids & Favors sections.

10.4.1. Map Zoom and Pan



Each click of the **Pan** button directional arrows moves the map view in that direction by 10% of the visible area. You can also hold down the Control (Ctrl) button and press the directional keys on your keyboard to pan.



The **Zoom** bar can be used to zoom the map view in and out. You can click the + and – buttons to zoom in and out one level at a time. You can also hold down the Control (Ctrl) button and press the + and – keys on your keyboard. Alternatively, you can click the slider and drag it to the desired zoom level or click on the slider bar to go directly to a specific zoom level.

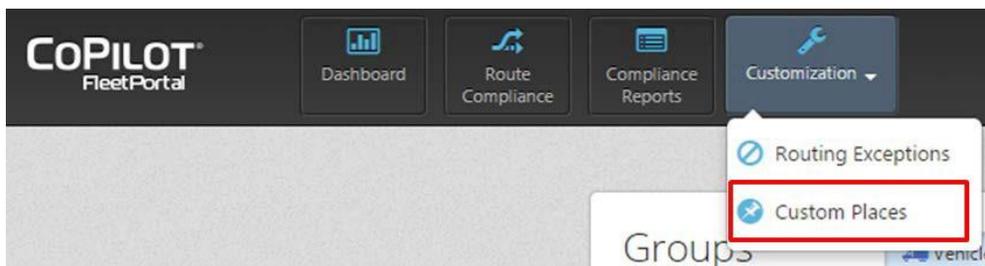
10.4.2. Map Quick Tools

The map tools are used to interact with the map, quickly panning or zooming to the desired level and gathering additional information about the visualization itself.

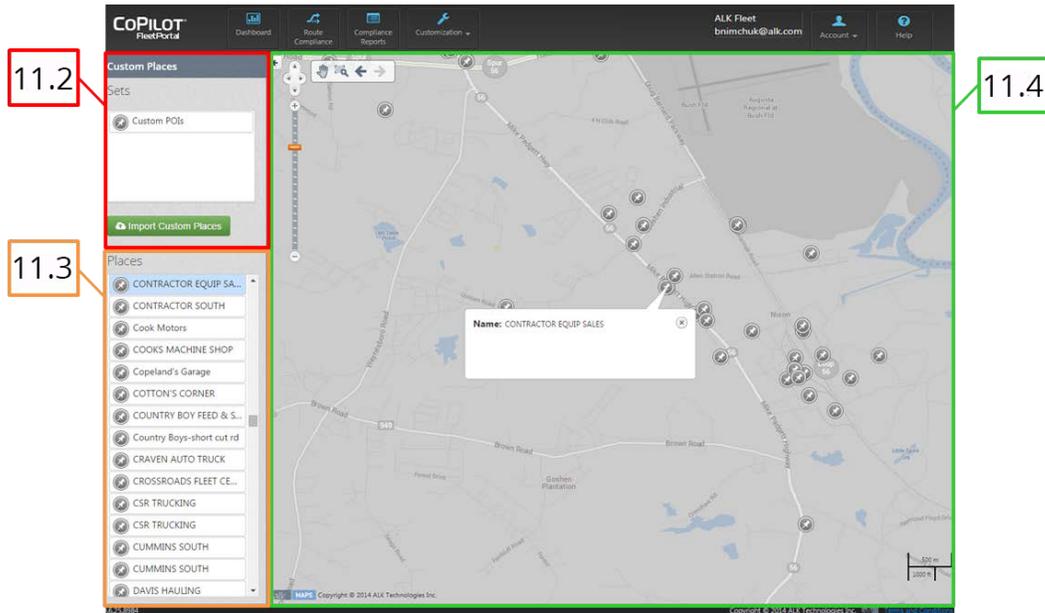


-  **Hand Tool** – when selected you can grab and drag the map view around to the desired position. This is the default behavior when you just click an open space on the map and drag it.
-  **Zoom Box** – when selected you can click one point on the map, drag to a second point on the map, and zoom in to the area within the box you just created.
-  **Previous Map View** – acts as an “undo” button, sending you back to the map location and zoom level you were previously looking at. *For example, if you had zoomed in once, then panned to the North, then zoomed in a second time, pressing the Previous Map View button would act as an “undo”, removing the second zoom in action.*
-  **Next Map View** – acts as a “redo” button, sending you forward if you had just used the *Previous Map View* button. *For example, if you had zoomed in once, then panned to the North, then zoomed in a second time, pressing the Previous Map View button would act as an “undo”, removing the second zoom in action. Subsequently pressing the Next Map View button would act as a “redo”, replacing the second zoom in action.*
-  **Information Tool** – when selected, you can click on a map data item such as *Rejoined Planned Route* to get more information about that data item. This is the default behavior when you click on a data point on the map.

11. Chapter 11: Custom Places



11.1. Components of the Custom Places Page

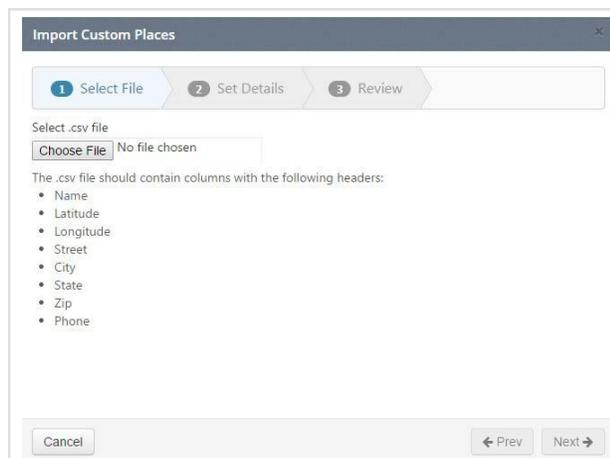
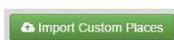


11.2. Sets

Currently CoPilot FleetPortal only supports a single set of Custom Places, also known as Custom Points of Interest (POIs). If you have already imported a Custom Places set, it will be listed in the Sets section.

11.2.1. Importing Custom Places Set into CoPilot FleetPortal

To import a Custom Places set, click on the **Import Custom Places** button.



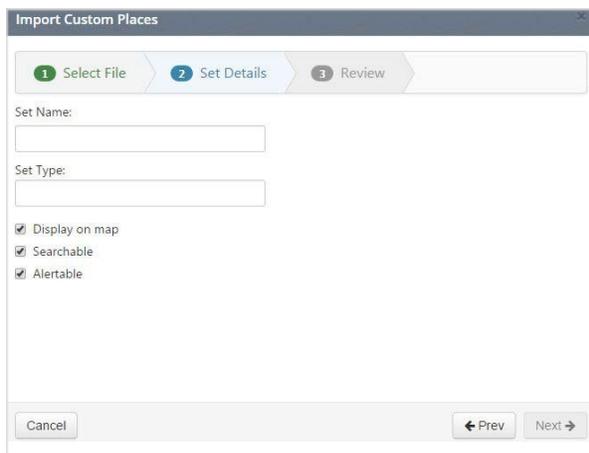
A wizard will open to guide you through the import process.

11.2.1.1. Select File

Click on the **Choose File** button to select the file that contains your Custom Places set previously saved in .csv format. The .csv file should contain columns with the headers as listed in the wizard. At a minimum, each Place needs to have something in the Name and either Latitude and Longitude or Street, City, State, and Zip columns. Click the **Next** button.

11.2.1.2. Set Details

The next step is to define the configurations for the Custom Places set.

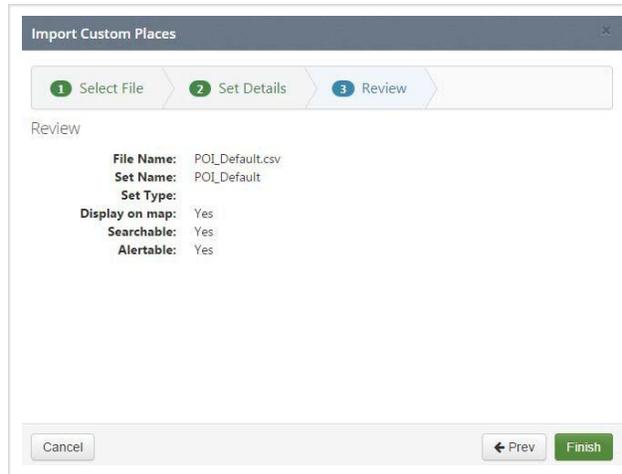


The screenshot shows a window titled "Import Custom Places" with a progress bar at the top containing three steps: "1 Select File", "2 Set Details" (which is highlighted), and "3 Review". Below the progress bar, there are two text input fields: "Set Name:" and "Set Type:". Underneath these fields are three checked checkboxes: "Display on map", "Searchable", and "Alertable". At the bottom of the window, there are three buttons: "Cancel", "← Prev", and "Next →".

- **Name** – choose a name for the Custom Places set. This name will be used as the name of the custom Point of Interest (POI) set in CoPilot Truck in-vehicle for the driver as well as on CoPilot FleetPortal.
- **Set Type** – this may be used in the future to assign a specific icon to the Custom Places set, when the Point of Interest is displayed on the map in-cab.
- **Display on map** – when checked, the Custom Places will show as Points of Interest (POIs) on the map in-vehicle.
- **Searchable** – when checked, the Custom Places will be available to search by the driver in-vehicle.
- **Alertable** – when checked, the driver will receive a visible alert in-vehicle when in proximity to a Custom Place. The driver may tap on this alert to get directions to the Point of Interest.

11.2.1.3. Review

The final step is to confirm all the settings for the Custom Places import, then click the **Finish** button.



11.3. Places

All of the locations in the current Custom Places set will be listed in the Places section alphabetically. Select the location from the list of Custom Places you wish to see on the map by clicking on its name.



The map view will automatically zoom to show that specific Custom Place, and will pop up a callout with the Custom Place name and any address data included on the imported Custom Places file.



11.4. Map Visualization

This section is the visualization on a map of the Custom Places associated with the Custom Places set currently imported into FleetPortal. Custom Places, or Points of Interest, are shown as pins  on the map and can be clicked on to provide additional information.

To expand the map further, you can click the  button to minimize the Sets and Places sections.

11.4.1. Map Zoom and Pan



Each click of the **Pan** button directional arrows moves the map view in that direction by 10% of the visible area. You can also hold down the Control (Ctrl) button and press the directional keys on your keyboard to pan.



The **Zoom** bar can be used to zoom the map view in and out. You can click the **+** and **-** buttons to zoom in and out one level at a time. You can also hold down the Control (Ctrl) button and press the **+** and **-** keys on your keyboard. Alternatively, you can click the slider and drag it to the desired zoom level or click on the slider bar to go directly to a specific zoom level.

11.4.2. Map Quick Tools

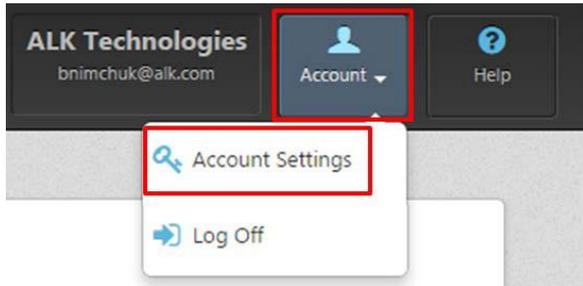
The map tools are used to interact with the map, quickly panning or zooming to the desired level and gathering additional information about the visualization itself.



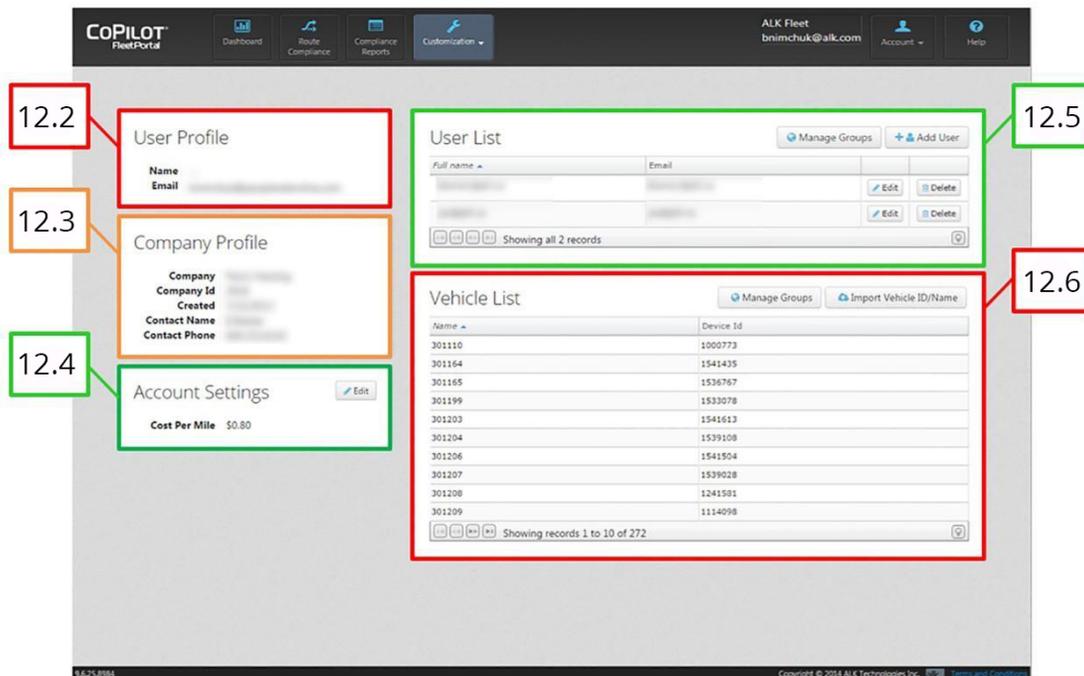
-  **Hand Tool** – when selected you can grab and drag the map view around to the desired position. This is the default behavior when you just click an open space on the map and drag it.
-  **Zoom Box** – when selected you can click one point on the map, drag to a second point on the map, and zoom in to the area within the box you just created.
-  **Previous Map View** – acts as an “undo” button, sending you back to the map location and zoom level you were previously looking at. *For example, if you had zoomed in once, then panned to the North, then zoomed in a second time, pressing the Previous Map View button would act as an “undo”, removing the second zoom in action.*
-  **Next Map View** – acts as a “redo” button, sending you forward if you had just used the *Previous Map View* button. *For example, if you had zoomed in once, then panned to the North, then zoomed in a second time, pressing the Previous Map View button would act as an “undo”, removing the second zoom in action. Subsequently pressing the Next Map View button would act as a “redo”, replacing the second zoom in action.*

-  **Information Tool** – when selected, you can click on a map data item such as *Rejoined Planned Route* to get more information about that data item. This is the default behavior when you click on a data point on the map.

12. Chapter 12: Account Settings



12.1. Components of the Account Settings Tab



12.2. User Profile

This section contains identifier information for the user that is currently logged in (you).

- Name** – your name, as defined when creating your user account in CoPilot FleetPortal.
- Email** – your email, as defined when creating your user account in CoPilot FleetPortal.

12.3. Company Profile

This section contains basic information about your company's profile in CoPilot FleetPortal.

- **Company** – the company name, as defined when your company's account was created in CoPilot FleetPortal.
- **Company ID** – the company identifier that is defined by your telematics provider.
- **Created** – the date when your company's account was created in CoPilot FleetPortal.
- **Contact Name** – the primary contact person associated with your company's account.
- **Contact Phone** – the primary phone number for the contact person associated with your company's account in CoPilot FleetPortal.

12.4. Account Settings

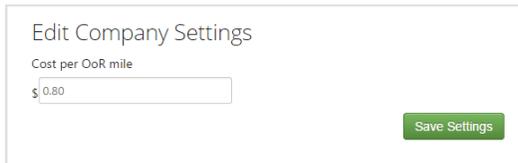
Account Settings is where you define your company's **Cost Per Mile** amount, which is used for the **OOB Cost** (Out of Route cost) calculation in the Route Compliance reports.

12.4.1. Changing Cost Per Mile

To change **Cost Per Mile** settings, click the **Edit** button.



A new page will open, with the option to edit company settings.

A screenshot of the "Edit Company Settings" form. It has a title "Edit Company Settings" and a label "Cost per OoR mile". Below the label is a text input field containing "\$ 0.80". To the right of the input field is a green button labeled "Save Settings".

Type in a new **Cost per OOR mile** in the entry field and click the **Save Settings** button to save your changes. This is the [Cost Per Mile] amount in the **OOB Cost** (Out of Route) calculation in the various Route Compliance reports. $[OOB\ Distance] * [Cost\ Per\ Mile] = [OOB\ Cost]$



Click the **Back** button if you want to cancel any changes without saving.



12.5. User List

The User List section is where company administrators can add and manage users in CoPilot FleetPortal. The table of users is paginated. At the bottom of the User List section a note will state how many users are displayed and the total number of users in the Copilot FleetPortal company account.

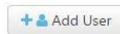


Clicking the light bulb icon allows you to change the number of rows of users that are displayed in the User List.

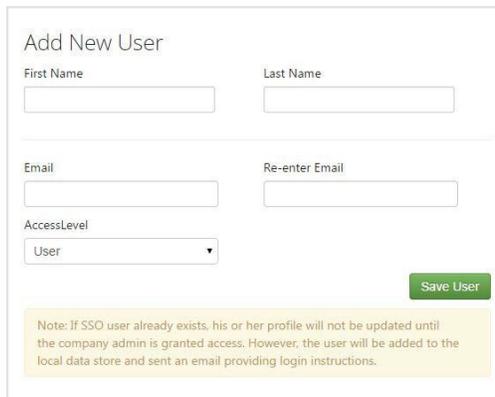


12.5.1. Add a New CoPilot FleetPortal user

To add a new CoPilot FleetPortal user, click the **+Add User** button.



A new page will open with the fields necessary to create a new CoPilot FleetPortal user.



Fill out the fields and select the appropriate security access level for the new user. All fields are required.

Access levels:

- **User** – standard user level, with access to only view data and run reports.
- **Company Admin** – company administrator user level, with standard user level access plus the ability to create and manage users and change company settings.

Click the **Save User** button to finish creating the new CoPilot FleetPortal user. The new user will be sent an email that will explain how to log in the first time and create their CoPilot FleetPortal account password.



Click the **Back** button if you want to cancel any changes without saving.



12.5.2. Edit, Disable, or Reactivate an Existing CoPilot FleetPortal User

To edit an existing CoPilot FleetPortal user, click the **Edit** button on the appropriate row in the User List table.



A new page will open with the same fields as those necessary to create a new CoPilot FleetPortal user.

Edit User Profile

First Name	Last Name
<input type="text" value="Test"/>	<input type="text" value="User"/>

Email	Re-enter Email
<input type="text" value="testuser@alk.com"/>	<input type="text" value="testuser@alk.com"/>

AccessLevel

Note: unable to edit the user's SSO profile unless she or he has explicitly granted the company admin access to that info.

To edit any fields that need changing, simply click in the text field and make the required changes. Click on the **Save User** button to save your changes.



To deactivate a user account without deleting it, click the **Disable** button.



To reactivate a disabled user account, click the **Enable** button.



Click the **Back** button if you want to cancel any changes without saving.

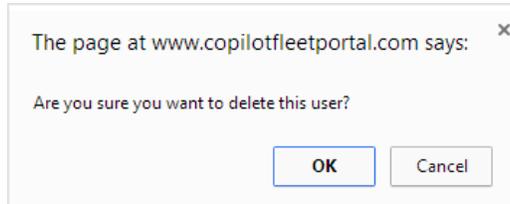


12.5.3. Delete an Existing CoPilot FleetPortal User

To delete an existing CoPilot FleetPortal user, click the **Delete** button on the appropriate row in the User List table.



A pop up warning will appear, asking you to confirm the user deletion.



Click **OK** to delete the user, or **Cancel** to avoid deleting the user.

12.6. Vehicle List

The Vehicle List section lists all vehicles currently recognized for the company account in CoPilot FleetPortal. The table of vehicles is paginated. At the bottom of the Vehicle List section a note will state how many vehicles are displayed and the total number of vehicles in the Copilot FleetPortal company account.



Clicking the light bulb icon allows you to change the number of rows of vehicles that are displayed in the Vehicle List.



Typing in the search box will filter the Vehicle List results so that only vehicles with either a Vehicle Name or Device ID that contains those characters will be displayed.

Vehicle List		
Vehicle Search...		
Manage Groups Import Vehicle ID/Name		
Name	Device Id	
106003803	106003803	Edit
106033115	106033115	Edit
106043324	106043324	Edit
106046532	106046532	Edit
107101573	107101573	Edit
107130039	107130039	Edit
108000059	108000059	Edit
108000101	108000101	Edit
108000238	108000238	Edit

Name – the vehicle name, that displays in CoPilot FleetPortal reports, alerts, and visualizations.

Device ID – the unique identifier for the device associated with the vehicle, as defined in your telematics partner’s system.

12.6.1. Change Individual Vehicle Names

Vehicle Names can be edited on an individual vehicle basis by clicking the in-line Edit button. Enter in a new Vehicle Name and click Save.

Note: *Vehicle Names must be unique within your account. CoPilot FleetPortal will block attempts to create duplicate names.*

12.6.2. Change Vehicle Names in Bulk

To assign Vehicle Names in bulk, click on the Import Vehicle ID/Name button at the top of the Vehicle List section. A pop up box will appear.



Click on the **Choose File** button to find the .csv file that contains your vehicle list with two columns: Vehicle ID and Vehicle Name. Click the **Next** button.

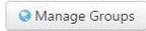
The Review tab will display the number of rows in your .csv file. This can exceed your current active vehicles count, as CoPilot FleetPortal will only update the Vehicle Names for Vehicle IDs if a match is found in the active vehicles for your account. Click **Submit** to import your file.

If there are duplicate Vehicle IDs or Vehicle Names in your file, or if the import of the file would cause duplicate Vehicle Names to be created, the file will not import and no changes will be made. The specific vehicles triggering the error will be identified both on screen and through a downloadable .csv status file.

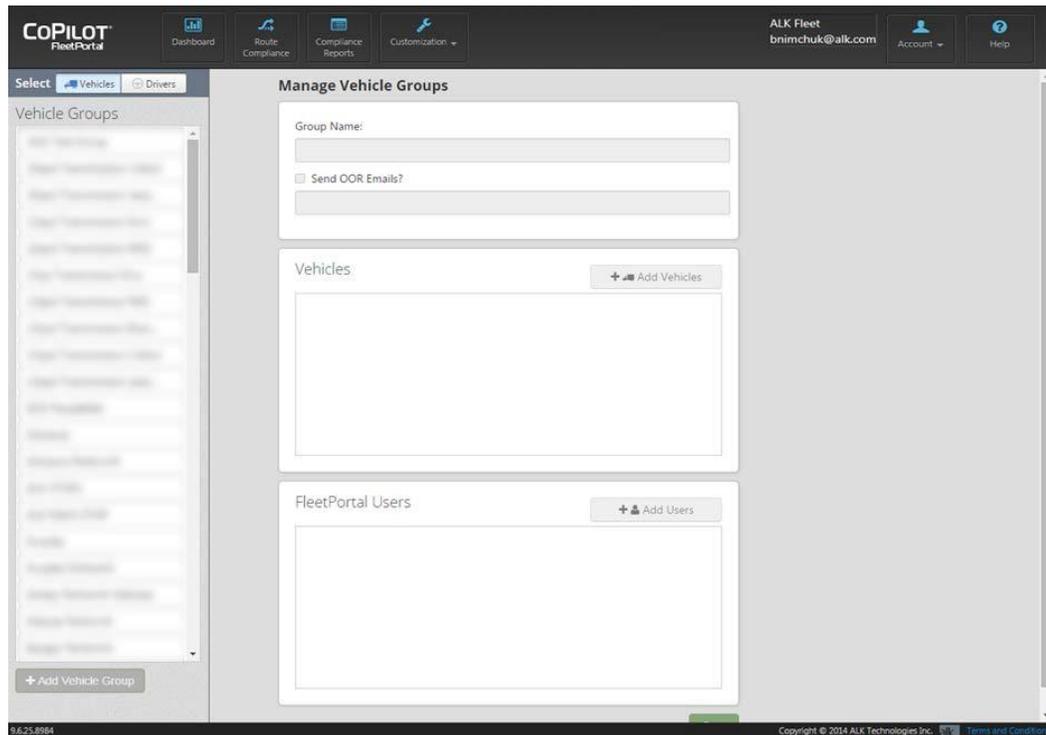
If there are no errors, the import will be successful and all Vehicle Names with matching active Vehicle IDs will be updated. Any Vehicle IDs that do not have a match in your account will be noted both on screen and in a downloadable .csv status file.

12.7. Manage Vehicle Group Assignment

To manage which vehicles are assigned to groups or which vehicle groups are assigned to users, and therefore visible to those users, click on the **Manage Groups** button.



A new page will open. On the left is a list of existing vehicle groups. On the right are the management tools for user and vehicle or user assignment, as well as the destination for out of route alert emails at the group level.



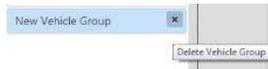
12.7.1. Selecting a Vehicle Group

The vehicle groups list will display all active vehicle groups within the account. Select a single group by clicking on it.

To create a new custom vehicle group, click on the **+ Add Vehicle Group** button.



To delete a vehicle group, hover your cursor over the group you want to delete. Click on the  to delete the group. Accept the pop up to confirm the group deletion.



Note: a default group is automatically created for all vehicles as they are imported from the telematics partner.

12.7.2. Managing Group Name, Out of Route Email Destination

Once a group is selected, the **Group Name** will be displayed. This can be edited by clicking in the Group Name field and making any desired changes.

A screenshot of the 'Manage Vehicle Groups' form. The form has a title bar with 'Manage Vehicle Groups'. Below the title bar, there is a 'Group Name:' label followed by a text input field containing 'IALK Test Group'. Below the text input field, there is a checkbox labeled 'Send OOR Emails?' which is currently unchecked. Below the checkbox, there is a text input field for entering an email address.

Mark the **Send OOR Emails?** checkbox to enable Out of Route email alerts for the group. The emails will be sent to the email address entered in the text field below **Send OOR Emails?** To send email alerts to more than one email, set up a distribution list on your email exchange server and enter the distribution list email address in this field.

Note: Route Compliance must be active in-cab for Out of Route email alerts to be triggered by CoPilot Truck.

12.7.3. Viewing Vehicles in the Group

Once a group is selected, the list of vehicles in the group will be displayed.

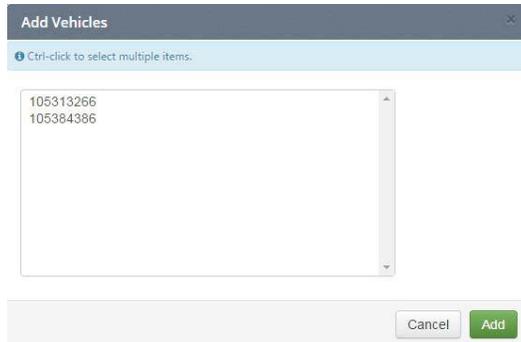
A screenshot of the 'Vehicles' list. The list is titled 'Vehicles' and has a '+ Add Vehicles' button in the top right corner. The list contains five entries, each with a blue truck icon and a vehicle ID: A13138, A13166, A13606, A13607, and A14009.

12.7.4. Add Vehicles to a Group

Click the **+ Add Vehicles** button to add one or more vehicles to the group.



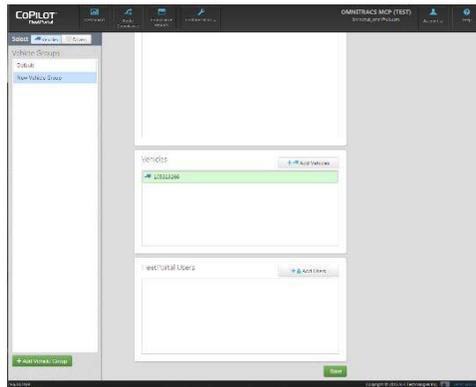
A pop up will appear with a list of all active vehicles in the CoPilot FleetPortal company account that are not already in the group. Ctrl-click or shift-click to select multiple vehicles and add them to the group.



Click on the **Add** button to add the vehicles to that group, or **Cancel** to go back without saving your changes.



The newly added vehicles will be visible in the **Vehicles** section, highlighted in green.



Click on the **Save** button at the bottom of the page to save your changes.



12.7.5. Remove Vehicles from a Group

To remove one or more vehicles from the group, hover your cursor over the vehicle to be removed from the **Vehicles** section. A small **x** will appear at the end of the row. Click on this **x** to mark the vehicle for removal from the group. The vehicle name will be highlighted in red.



To undo the marking of a vehicle for removal from a group, hover your cursor over their name in the **Vehicles** section. A small  will appear at the end of the row. Click on this  to unmark the vehicle for removal from the group. The vehicle name will no longer be highlighted.

Click on the **Save** button at the bottom of the page to save your changes.



12.7.6. Add Users to a Group

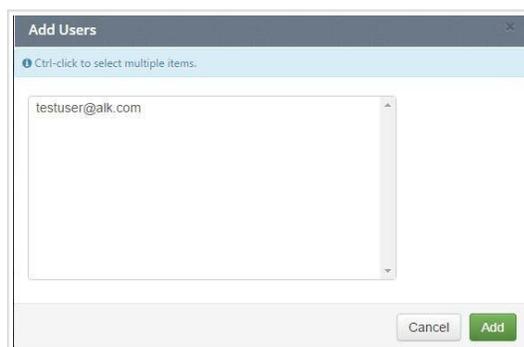
Standard CoPilot FleetPortal users (non-company admin users) will need to be given access to vehicle groups in order to be able to run reports on those groups and view their data. Access is given by adding users to the group under **FleetPortal Users**.

Note: company administrator users automatically have access to all vehicle groups, and cannot have that access removed.

Click the **+Add Users** button to add one or more users to a group.



A pop up will appear with a list of all active users in the CoPilot FleetPortal company account. Ctrl-click to select multiple users and add them all at once.



Click on the **Add** button to add the users to that group, or **Cancel** to go back without saving your changes.



The newly added users will be visible in the **FleetPortal Users** section, highlighted in green.

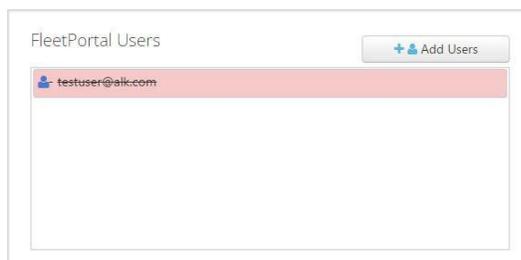


Click on the **Save** button at the bottom of the page to save your changes.



12.7.7. Remove Users from a Group

To remove a user's access to a group, hover your cursor over their name in the **FleetPortal Users** section. A small **x** will appear at the end of the row. Click on this **x** to mark the user for removal from the group. The user's name will be highlighted in red.



To undo the marking of a user for removal from a group, hover your cursor over their name in the **FleetPortal Users** section. A small **o** will appear at the end of the row. Click on this **o** to unmark the user for removal from the group. The user's name will no longer be highlighted.

Click on the **Save** button at the bottom of the page to save your changes.



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