



omnitracs

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## Omnitracs Initial Setup Guide

80-JC479-1 Rev. A

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# Welcome to Omnitracs

Follow this guide to get your fleet up and running quickly with Omnitracs. The basic setup covered here provides an immediate boost to your fleet, and the experience with your units will help you merge Omnitracs with your daily operations. You'll pick up the basics of using the office systems as you complete these steps, and you can fine tune your settings later.

This guide is just the initial setup needed to get started with Omnitracs and covers setting up the following areas and applications:

- "Customer Portal" on page 6
- "QTRACS" on page 14
- "Hours of Service (HOS)" on page 28
- "Vehicle Inspection Report (MR)" on page 36
- "Critical Event Reporting (CER)" on page 40
- "Performance Monitoring" on page 45

If you need assistance or have questions about these areas and applications beyond the initial setup or if you purchased other applications not covered here, visit our [Training site](#) for more information and videos.

# Customer Portal

The Customer Portal is the central, administrative hub for your account. From the Customer Portal you can manage your users and account profile, find training and support, and access your applications. We recommend you take some time to look around the Customer Portal to familiarize yourself with all of the features available to you.

You will only see icons for applications and services available to you. Orange icons are service applications that are ready for use. Gray icons are for applications that are still in the configuration process. Green icons are for account management tasks, shopping for new products or services, or managing users.

Setting up your Customer Portal account is the first component to getting your Omnitrac account up and running. There are four steps involved in the initial setup of the Customer Portal:

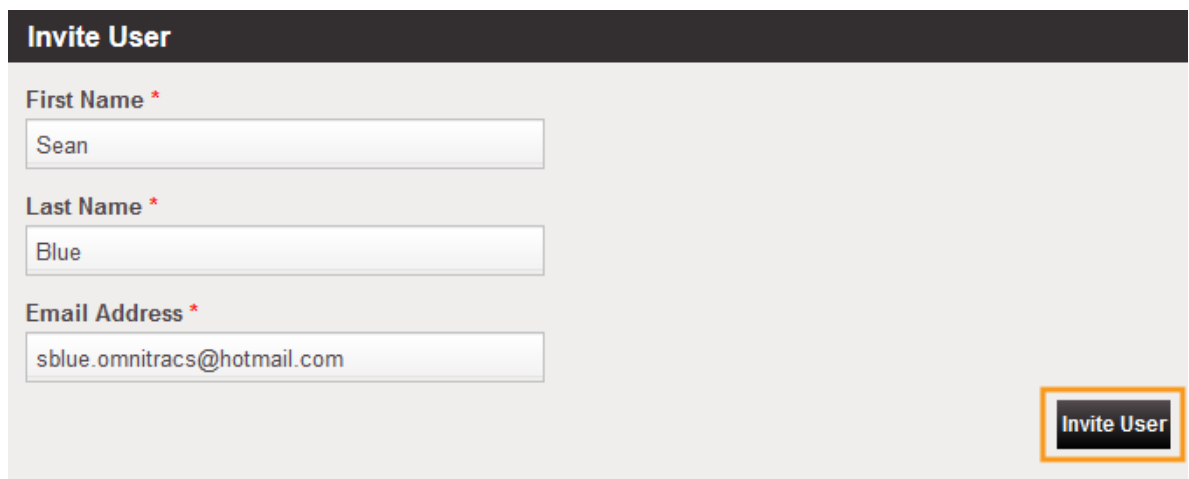
- ["Add Users to you Company's Account" on the next page](#)
- ["Manage Roles and Capabilities" on page 9](#)
- ["Accept Transfers" on page 11](#)
- ["Create and Manage Operational Profiles" on page 12](#)

# Add Users to you Company's Account

When you company's account is first created, only a company administrator account is created, which serves as the primary administrator. To add more users, you need to invite them. Before you begin, gather a list of users you want to invite, including their first and last names and email addresses. Omnitracs recommends you always have at least two active users with full admin access in case one of them gets locked out or leaves your organization.

## Invite Users

1. Log in to the Customer Portal at <https://login.omnitracs.com>.
2. At the top of the page, click your name then click **My Profile** in the drop-down menu.
3. In the list on the left, click **Invite User**.
4. Enter the new user's first name, last name and email address.
5. Click the Invite User button.



**Invite User**

First Name \*  
Sean

Last Name \*  
Blue

Email Address \*  
sblue.omnitracs@hotmail.com

Invite User

The new user has now been invited to the Customer Portal. They will receive an invitation email with instructions for how to register in the customer portal. After they create a password and update their contact information, they'll be able to log in to the Customer Portal using their new password. The email address the invite was sent to will be their user id. You will also receive a copy of the automated invite email.

*Note: Customers cannot cancel Customer Portal invitations once they are sent. If you need to cancel an invitation after sending it, contact Omnitrac's Technical Support. Omnitrac's Technical Support can be contacted by creating a support case in the Customer Portal > Support or by calling 800-541-7490.*

## View Status of Invites

You can monitor the invites you send out to see when the invites are accepted and new users register.

1. Log in to the Customer Portal at <https://login.omnitrac.com>.
2. At the top of the page, click your name then click **My Profile** in the drop-down menu.
3. In the list on the left, click **Manage Users**.
4. Change **Login Enabled** to No and click **Submit**.

The user's status is shown as "Invited" until the user clicks the link in the invite email and sets their Customer Portal password, then their status will automatically update to "User."

## Re-Send an Invite

Circumstances can arise when a Customer Portal invitation needs to be re-sent to an invited user. However, Company Administrators are unable to retrieve or cancel user invitations in the Customer Portal. If this happens, first check with the user to see if they can locate the invitation in their email account. Be sure to have them check their junk, archive, and trash folders. If the user cannot find their invitation, check with the admin that invited the user to see if they still have a copy of the invitation. A copy is automatically sent to the admin each time they invite a user. If you still cannot locate the invitation, you will need to contact Omnitrac Technical Support to have the invitation canceled and then you will be able to resend it.



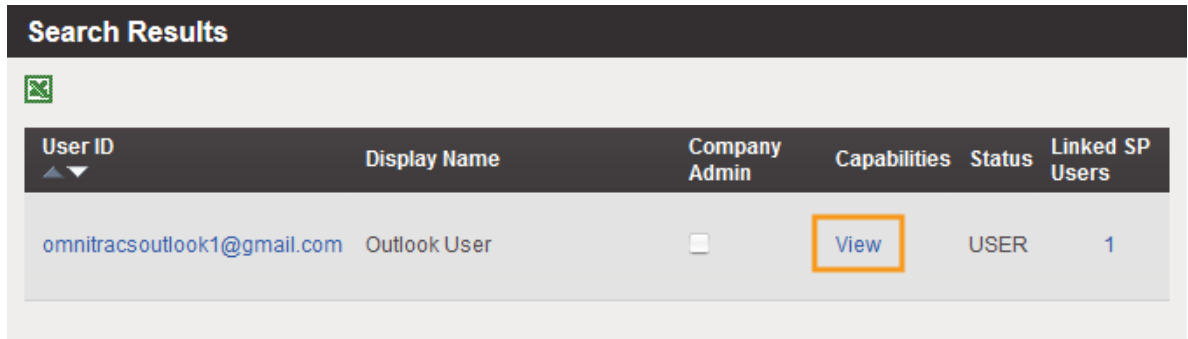
# Manage Roles and Capabilities

Roles and capabilities are permissions and collections of permissions you can grant to users to perform different actions within the Customer Portal. Be aware that the roles and capabilities granted through the Customer Portal only apply to the Customer Portal and not to Services Portal applications such as QTRACS or Hours of Service. Those permissions are managed through the Services Portal Administration section.

A capability is a level of access or function a user can perform and roles are collections of capabilities. Once a user accepts the invitation you sent them and registers with the Customer Portal, you need to assign them the appropriate role and capabilities. Before beginning, you should determine which roles and/or capabilities you want to grant to which users. Review the [Roles and Capabilities in the Customer Portal](#) page to see a description of each capability and what capabilities are included with each role. You can mix and match combinations of roles and capabilities as you see fit to meet your company's need. You can also create custom roles if needed.

## Assign Roles and Capabilities

1. In the Customer Portal, at the top of the page, click your name then click **My Profile** in the drop-down menu.
2. In the list on the left, click **Manage Users**.
3. Enter the user ID or other information you know for the user you want to assign capabilities to, then click **Submit**.
4. Find the user you are looking for in the search results below and click **View** in the Capabilities column.



The screenshot shows a 'Search Results' table with the following data:

User ID	Display Name	Company Admin	Capabilities	Status	Linked SP Users
<a href="#">omnitracsoutlook1@gmail.com</a>	Outlook User	<input type="checkbox"/>	<a href="#">View</a>	USER	1

5. If you want to assign a role to the user, click **Grant/Revoke Roles**, then check the boxes next to each role you want to assign to the user.
6. When you are done selecting the roles you want to assign, click **Save**.
7. If you want to assign capabilities a la carte, click

8. If you want to assign a role to the user, click Grant/Revoke Capabilities, then check the boxes next to each capability you want to assign to the user. Click the + or - buttons next to the different sections to expand or collapse them.
9. When you are done selecting the roles you want to assign, click **Save**.

## Create Custom Roles

1. In the Customer Portal, at the top of the page, click your name then click **My Profile** in the drop-down menu.
2. In the list on the left, click **Manage Roles**.
3. Click **Create New**.
4. Give the new role a name and a description.
5. Check the boxes next to each capability you want to assign to the user. Click the + or - buttons next to the different sections to expand or collapse them.
6. Click **Save**.

# Accept Transfers

If you purchase units from an Omnitracs partner instead of directly from Omnitracs, you will need to accept the transfer of those units into your account before you begin using them. It is recommended you do this before installing the units in any vehicles. If you purchased your units directly from Omnitracs, you can skip this step.

## Accept Transfer

When you purchase units from an Omnitracs partner you receive an email prompting you to log in to the Customer Portal and accept the transfer of those units. If you do not receive the email or delete it before accepting the transfers you can also log in to the Customer Portal then click Transfers and Accept Transfers.

1. Log in to the Customer Portal.
2. Scroll to the bottom of the page and click **Transfers**.
3. Under Accept Transfers, click **Continue**.
4. On the Accept Transfers page, click the reference number.
5. Review the list of units to be transferred.
6. Click **Accept**.

# Create and Manage Operational Profiles

Once you have all your units in your account, you need to create operational profiles to assign the units to. Operational profiles allow you to enable applications and services on your Omnitrac Intelligent Vehicle Gateway (IVG) and Mobile Computing Platform (MCP) hardware units. All units are initially assigned to the default operational profile for their unit type when first added to your account. Operational profiles also determine how you are billed. Once you add mobile units to an op profile, you will begin being billed for the applications enabled. Every account has an Initial Op Profile (Default) for each type of device in your organization. Any units that are shipped or transferred to your company go in to this operational profile. To ensure that you're not paying for applications on mobile units that aren't installed or avoid enabling applications on mobile units before your drivers are trained, use the initial operational profile as a storage area without any additional applications.

## Create a New Operational Profile

1. From the Customer Portal home page, click **Op Profiles**.
2. Under Create New Profiles, click **Continue**.
3. You can create a new operational profile or duplicate an existing profile if you already created a new profile.
  - a. To create a new operational profile, select the hardware type (platform) you want to create a profile for then type a name for the profile. You can also add a description if desired.
  - b. To duplicate an existing operational profile, click the radio button next to Duplicate Existing Profile then select the profile you want to duplicate from the drop-down list and type a name for the new profile. You can also add a description if desired.
4. Click **Next**.
5. First select the service plan for the operational profile. The service plan is a bundled group of applications based on the type of service plan. You can switch between the different plans to see which applications are included in the bundle.
6. Scroll down on the page and select any additional applications you would also like enabled for the operational profile. Click the ? button next to each application for a description of the application.

*Note: If an application is grayed out, you haven't purchased it and therefore cannot enable it on your mobile units. Contact your Customer Experience Representative for help purchasing applications.*

7. When you are done choosing which applications you want enabled in the operational profile, click **Continue**.
8. On the next screen, verify the settings and applications for the operational profile.
  - a. Review the profile name, platform, and description. If you need to make changes, click **modify**.

*Note: After you make changes and click next the service plan you previously selected may change. Just select the service plan from the list again and all the applications you had previously selected will still be selected.*

- b. Review the notes for each application in the Message column and ensure you have selected all the prerequisite applications and you have no conflicting applications. If you need to remove an application, click the - button for the application in the Remove Application? column. If you need to add an application, click **Back** and select the application.
  - c. Review the monthly and incremental costs for the application. Each unit added to the operational profile will accrue the listed charges.
9. Once you are satisfied with the applications selected, click **Create Profile**.

## Assign units to an Operational Profile

After you create your new operational profiles you need to assign units to the profile.

1. From the Customer Portal home page, click **Op Profiles**.
2. Under Move Units, click **Continue**.
3. In the box on the left, select the profile you want to move units from. When units are first added to your account they are added to the Initial Op Profile (Default) for the associated device type.
4. In the box on the right, select the operational profile you want to move the units to.
5. Select the UA (serial number) for the device you want to move. Hold down ctrl while selecting to select multiple devices at once.
6. Click the > button to move the units or click the >> button to move all the units shown on the screen.
7. Click **Next** to confirm.
8. Review the list of applications that will be enabled for the unit when it is moved.
9. Click **Confirm Move**.

# QTRACS

Before you begin using the system, you must complete initial configuration. Your Customer Experience Representative (CER) will help you make decisions to use the system effectively. For help while completing tasks, click **?** for task specific assistance or **Help** at the top of the page. There are also links to videos further explaining and demonstrating the processes at the end of each section.

Before you start you need to make sure you have set up all your users in the Customer Portal first. Finally, you will want easy access to information about all your drivers, including their full names and CDL numbers.

There are nine steps involved in the initial setup of QTRACS:

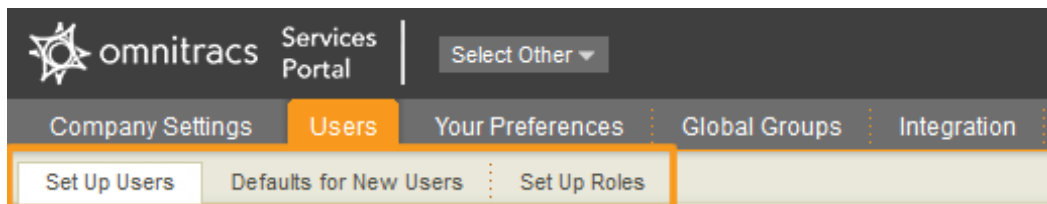
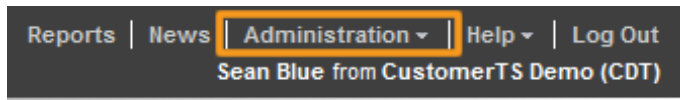
- ["Set Up Roles and Users" on the next page](#)
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# Set Up Roles and Users

Users you create in the Customer Portal will also be auto created for you in the Services Portal, but roles and capabilities from the Customer Portal do not transfer to the Services Portal. You will need to create Services Portal specific roles and assign those roles to your users. There are three tasks, which should be completed in this order:

- **Set up Roles:** Create roles like Dispatcher, Maintenance, or Safety Manager based on groups of user permissions. Ensure those roles include all application-specific permissions required to access and use each application.
- **Defaults for New Users:** Identify the default role and preferences assigned during new user creation.
- **Set up Users:** Most of your users will be created through the Customer Portal but you will need to review these auto-created users to ensure they were created correctly and to adjust roles as needed. If you plan to use integration or are not enabled for single sign on, you will need to create new users in the Services Portal.

1. Log in to the Customer Portal using the credentials supplied by your Customer Experience Representative (CER), then click Services Portal at the top of the home page.
2. Click **Administration** at the top of the page. The three tasks appear as sub-tabs under the Users tab.



3. Complete each task in the order listed above (Set Up Roles, Defaults for New Users, Set Up Users). Refer to the online help and your CER for assistance.

# Configure Company Settings

1. Log into the Services Portal.
2. In the upper right of the screen, hover over **Administration** and in the drop-down menu, click **Administration**.
3. Click **Company Settings**, then click **General Company Settings**.
4. Enter your company-wide information and preferences and click **Save**.
5. Click **QTRACS**.
6. Review the data retention settings and adjust as needed within the minimum and maximum allowances. The default for position history data retention is 180 days in accordance with FMCSA requirements.



# Set Up Drivers

You must create drivers in QTRACS so they can log into the mobile devices in their vehicles. Drivers must log in to use applications and record electronic logs.

If you wish to assign endorsements or limitations, or want customized fields, such as driver uniforms, you can set them up in QTRACS Company Settings.

## To add new drivers

1. In the QTRACS application, click the **Drivers** tab.
2. Click **Bulk Import**.
3. Read the information on the overview tab to understand the process then click **Sample**.
4. Choose whether you want to download a basic or advanced spreadsheet. The attributes included are shown on the screen and update dynamically as you switch between the two options. Review the included attributes and select the set that works best for your needs.
5. Ensure the option to download a few rows of sample data is selected.
6. Click **Generate Sample**. It typically takes a minute or less for the spreadsheet to be generated. A yellow asterisk appears next to Reports in the banner when the spreadsheet is ready to be downloaded.
7. In the banner, click **Reports** then click the CSV icon to download the sample spreadsheet.
8. Fill out the spreadsheet following the sample data to fill in the information for your drivers then save the spreadsheet to your computer.

*Note: Driver ID, Driver login name, First name, Last name, and Driver login are required fields. If you enter the CDL # for your driver, the issuing country and state/province is required.*

*Note: If you are licensed for Performance Monitoring, the Performance Monitoring password field is also required and each driver must have a unique password for Performance Monitoring. The Performance Monitoring password can be the same as the Driver login password.*

9. Click **Import**
10. Click **Choose File** and navigate to where you saved the spreadsheet on your computer and select it then click **Submit**.

11. Click Results and verify the drivers were created successfully. If not, click the hyperlinked error number to view the errors, make the corrections to your spreadsheet, and redo steps 9 and 10.

*Note: If you are licensed for Hours of Service (HOS) the entity maintenance bridge (EMB) is enabled by default for your company and will attempt to automatically create drivers in HOS based on the new drivers your create in QTRACS. You will be notified via an Alert in your notifier if the EMB fails to create the drivers in HOS.*

# Plan Vehicle Coverage

Every vehicle is required to be assigned a coverage, which can be a user or group of users (address list). Messages sent from a vehicle are sent to its assigned coverage.

If you have a small fleet and do not need a coverage, Omnitracs recommends you create a user and name it "Fleet" or "All Users" and assign it as the coverage for all your vehicles.

1. Identify the vehicles and coverage assignment. Determine what address lists you need to create. Adjust user roles as necessary.
2. Create address lists:
  - a. Click **Select Other** at the top of the page and click **QTRACS**.
  - b. Click **Setup**. The Set Up Address Lists page opens.
  - c. Click **Create Address List** and complete the information, adding users from the right to the **Users in list** box.
  - d. Click **Save**.
3. Create the Coverage:
  - a. Click **Coverages**.
  - b. Click **Create Coverage**.
  - c. Enter the User ID or Address List that will serve as the coverage. Click the magnifying glass button to see a list of users or address lists to select from.
  - d. Click **Add Vehicles**.
  - e. Enter the vehicle ID in the text field or click the magnifying glass button to see a list of vehicles to select from.
  - f. Click **Add**.
  - g. Repeat as necessary to add additional vehicles. You must add vehicles one by one.

*Note: If you installed any mobile units prior to creating coverages, you will need to manually edit the coverage for each vehicle a mobile unit was installed in.*

# Plan Vehicle Message Groups

Vehicle message groups are groups of vehicles, allowing you to send broadcast transmissions to an entire group with one message instead of having to individually send to each vehicle. Coverage groups can be designated as vehicle message groups.

Vehicle message groups use a group message ID number that is assigned by Omnitrac. A company is assigned 10 ID numbers when it receives its account. Additional group numbers can be requested if needed.

1. Identify vehicle message groups you need that are not already members of a coverage group.
2. Create message groups:
  - a. In QTRACS Setup, click **Vehicle Message Groups**.
  - b. Click **Create Vehicle Message Group**.
  - c. Click **Save and Add Vehicles....** You'll add vehicles later.
  - d. Type the vehicle Id in the vehicle ID field or click the magnifying glass button to select from a list of your vehicles.
  - e. Click **Add**.
  - f. Continue adding vehicles until complete.

When you create a new vehicle message group, QTRACS assigns it the next available group ID number. If you have no remaining numbers or have a pending request for an additional number, a message window pops ups and explains how to proceed.

# Configure Default Vehicle Settings

Vehicles are automatically created in QTRACS when the device is first powered on and communicates over the air. They receive default settings, such as their coverage, message group, and reporting interval, based on the default vehicle settings for your account.

1. In the QTRACS application, click the **Vehicles** tab.
2. Click **Default vehicle** above the list on the left. The default vehicle settings appear below the map on the right.
3. Check the boxes for the devices in your fleet. Different device types may have different default setting fields available for you to configure.
4. Click **edit** above the details on the right.
5. Configure the default settings based on your fleet's needs. Be sure to click the **Device Config** tab on the left to see all the fields.
  - a. Verify the positioning interval, which is how often the unit sends a mobile initiated position report (MIPR). Omnitrac recommends a 15 minute interval to ensure you have a detailed position history.
  - b. Power down timer is how long the unit waits after the vehicle's ignition is turned off before powering down. Omnitrac recommends a setting of 240 minutes.
6. Click **save**.

Overview Min Max Close

Default Show settings for:  IVG  MCP50  All Other MCPs  TMCT  MCT cancel | save ?

General **Positioning**

Device Config \*Regular interval: 000:15:00

**Wakeup**

\*Power down timer: 240 minute(s)

**Login**

Active driver interval: Disabled

# Set Up Vehicles

Vehicles are a representation of the Omnitrac mobile units you install in your vehicles. Mobile units are assigned to your account as you purchase them and are created as vehicles in QTRACS the first time they are powered on.

Before beginning you will need a list of all mobile units in your fleet including the serial number of the mobile unit and which vehicle it is installed in. You can ask your installers to track and report this information using the Installation Form found in appendix H of the [Omnitrac Intelligent Vehicle Gateway \(IVG\) Installation and Troubleshooting Guide](#) or you can instruct your installers to include the vehicle id, VIN, and license plate in a message sent from the mobile unit as part of the system verification process to confirm a successful installation. If your installers include the information in a message sent from the unit, you will need to log into QTRACS first and view your messages to collect the information. When collecting the information make note of the vehicle ID the message was sent from, which will be the serial number (UA) of the mobile unit. Refer your installers to chapter 7 of the installation guide for more information about system verification.

Once you have gathered the information and are ready to begin, you will use the bulk import tool and entity maintenance bridge (EMB) to configure your vehicles in QTRACS and Hours of Service (HOS). HOS configuration has additional steps that will be covered when you reach the HOS setup section.

1. In the QTRACS application, click the **Vehicles** tab.
2. Click **Bulk Import**.
3. Read the information on the overview tab to understand the process then click **Sample**.
4. Choose whether you want to download a basic or advanced spreadsheet. The attributes included are shown on the screen and update dynamically as you switch between the two options. Review the included attributes and select the set that works best for your needs.
5. Ensure the option to download a few rows of sample data is selected.
6. Click **Generate Sample**. It typically takes a minute or less for the spreadsheet to be generated. A yellow asterisk appears next to Reports in the banner when the spreadsheet is ready to be downloaded.
7. In the banner, click **Reports** then click the CSV icon to download the sample spreadsheet.
8. Fill out the spreadsheet following the sample data to fill in the information for your vehicles then save the spreadsheet to your computer.
  - a. For units that have already been installed in vehicles and powered on Vehicle ID will be the serial number of the mobile unit by default. Enter U as the action and enter the vehicle ID of the truck the unit is installed in as the New Vehicle ID.
  - b. If the units have not been installed yet, you can enter C as the action but Omnitrac recommends installing units first to ensure the units gets properly paired with the vehicle ID you assign to it.
  - c. Name is an alias for the vehicle and is optional.

- d. VIN, License Plate Number, and License Plate Jurisdiction are required for ELD.
  - e. Coverage is a required field. If you set up your default vehicle settings before installing the units, the coverage will be set to your default vehicle settings. Adjust the coverage as needed based on the coverages you planned previously.
  - f. Assign the vehicle to vehicle message groups as needed.
  - g. You can ignore HOS Depot ID and HOS Groups for now. You will configure those settings later when you reach the HOS setup section.
9. Click **Import**
  10. Click **Choose File** and navigate to where you saved the spreadsheet on your computer and select it then click **Submit**.
  11. Click Results and verify the vehicles were updated successfully. If not, click the hyperlinked error number to view the errors, make the corrections to your spreadsheet, and redo steps 9 and 10.

*Note: If you are licensed for Hours of Service (HOS) the entity maintenance bridge (EMB) is enabled by default for your company and will attempt to automatically update your vehicles in HOS based on the changes you make in QTRACS. You will be notified via an Alert in your notifier if the EMB fails to create the drivers in HOS.*

# Import/Create Macro Templates

Macros are electronic forms that dispatchers and drivers can fill out. These “templates” save time and reduce errors.

If you have no macros defined, you are prompted to import one of the following standard sets: Dry van, Flatbed, Reefer, LTL, Private Fleet, and Tanker. You can then modify them to match your business practices. Omnitracs recommends you click the hyperlink to review the macros before importing and only import if they meet your business needs. If you decide not to import you can create custom macros that better meet your needs. You will be prompted to import a set until you choose one or create custom macros. If you later decide you want a different set, you will need to delete all of your existing macros in order to be able to select a new set to import.

## To Import a set of macro templates

1. In QTRACS Setup, click **Macros**.
2. A pop-up window prompts you to select a default set of macros.
3. Do one of the following.
  - Click the radio button next to the macro set you want to import to select it and click **Import**
  - or if you do not want to import any macros and prefer to make your own custom macros, click **No, thanks**. You can always create additional custom macros and edit default macros even if you do import a default set.

*Note: If you choose not to import any macros, you will be prompted to do so each time you visit the page until you create a custom macro or import a set.*

4. If you selected a set to import, the macro list will populate with all of the imported macros and they will be marked as pending. The import typically only takes a minute or less. Wait a minute or two then click the Macros tab to reload the page. Once all macros have been successfully imported, you can edit the macro templates or create custom macro templates as needed.

## To edit a macro template

1. In QTRACS Setup, click **Macros**.
2. Select the type of macro, forward or return, from the drop-down list.
3. Click the macro name.



4. Add or change fields and labels as needed. If you need a field that does not appear, click the link below the field list and add one.
5. When you finish making changes, click **Save**.

## To create custom macro templates

1. In QTRACS Setup, click **Macros**.
2. If you're creating a forward macro, click **Create Forward Macro**. -OR- If you're creating a return macro, select Return from the Macro Type drop-down list, then click **Create Return Macro**.
3. Type an unused forward or return macro number between 1 and 63.
4. Fill out the remaining macro definition fields. For help with a specific field, click **?**.

*Note: When you're creating a return macro, you must select either a macro coverage or the vehicle coverage as the recipient of the message. An example of a macro coverage is a return macro for driver hours that is sent to the Payroll address list.*

5. Accept the default Template Builder Mode, and begin adding text and fields:
  - a. To title your macro template, enter the text to use in the **Insert/Update a Label** box and click **<<**.
  - b. To move to the next line, click **Insert Line**.
  - c. To label a field, type the text into **Insert/Update a Label** box and click **<<**.
  - d. To add a field, click the field in the **Insert a Field** list and click **<<**.
  - e. If prompted, type the number of characters to allow in the field.
  - f. To make a field required, click the item in the Macro Template box to select it then click **Required Field**.
  - g. To remove a label or field that you added in error, click the item in the Macro Template box to select it. Click Remove Item.
6. Continue adding labels and fields until the macro template is complete, then click **Save**.

# Set Up Custom Landmarks

Define your points of interest based on industry standard landmark types and attributes.

To create a landmark

1. In the QTRACS application, click **Landmarks**, then click **Add new landmark**.
2. Select the landmark type.
3. Type the address or geographical coordinates.
4. Click **Submit**. QTRACS uses an Internet geocoding service to find the location on a map.
5. Complete the basic landmark information and do one of the following:
  - If you don't want to add additional attribute information, click **save**.
  - If you want to add additional attribute information, click **save and continue**.

# Set Up Global Groups

Global groups allow you to associate user accounts with vehicles and drivers to restrict user access to information about the associated assets in applications that recognize global groups. They are also used as filters.

They can be used also to grant your customers limited access to information about vehicles hauling their loads and to establish your organizational hierarchy. Look in online help for more information about these uses.

## To set up global groups

1. Click **Administration** in the upper right corner.
2. Click the **Global Groups** tab.
3. Click **Add new global group**.
4. Type an ID and description for the global group.
  - Check the **Limit history** box if you only want QTRACS users, such as external users, to see position history, message history, and driver logon event history from the date the asset is put into the global group.
  - Check the **Visible to unlimited users** box if you want unlimited users to use this group to filter assets in applications that recognize global groups.
5. To assign users, select the users in the list on the right and click Add. Use Shift+Click to select a range of users or Ctrl+Click to select individual users.
6. If establishing a management hierarchy, click **Child Groups**. If not, click **Vehicles** or **Drivers**.

*Note: You can add child groups or assets (vehicles and drivers) to a global group, but not both.*

7. Select assets in the list on the right and click **Add**.
8. If you added vehicles or drivers and wish to add the other asset type, click its tab and use the instructions above to add them to the list.
9. When you're finished, click **save** above the group details on the right.

# Hours of Service (HOS)

Hours of Service (HOS) lets you replace your paper driver logs with electronic, onboard logs that are compliant with state, provincial, and federal regulations. To use HOS, you set up information about your drivers and trucks, HOS rule sets, and reporting groups.

Before you enable HOS, you must train your drivers thoroughly on how to keep logs on their unit.

To set up HOS, you perform the following tasks.

- ["Enter Your Company's Home Office Information" on the next page](#)
- ["Create Driver and Vehicle Groups" on page 31](#)
- ["Setup Driver HOS Log Rules" on page 32](#)
- ["Setup Driver HOS Log Rules" on page 32](#)
- ["Configure Vehicles in HOS" on page 34](#)

# Enter Your Company's Home Office Information

As part of your Hours of Service setup, you need to identify your depots, carriers, and the legal address for your company.

## Set Corporate Address

Federal regulations require that your company's full corporate name and address appear on your driver's logs and that you provide your DOT number. The company information you enter in HOS is only for driver logs and is not tied to the company information you previously set up when configuring QTRACS.

1. Click the **Administration** tab; then click **Office**.
2. Type your company's FMCSA-issued DOT number.
3. Type your company's full name and corporate address.
4. Click **Save**.
5. Click **OK** to confirm.

Now this address will appear on your hours of service logs.

## Set Up Carriers

If you run multiple carriers, you also need to set up those carriers so you can assign them to your drivers. The carrier address will replace your corporate address on driver logs if used.

1. Click the **Administration** tab; then click **Carrier**.
2. Ensure **New Carrier** is selected in the drop-down list.
3. Enter the FMCSA-issued DOT number for the carrier and the full, official name for the carrier.
4. Enter the address for the carrier.
5. Click **Save**.

## Set Up Depots

Depots identify the time zone of the driver's log books. All accounts have one default depot called Depot automatically. Omnitrac also recommends you create a Depot called Inactive to assign inactive drivers and vehicles to since you cannot delete drivers or vehicles in HOS.

1. Click the **Administration** tab; then click **Depot**.
2. Ensure **New Depot** is selected in the depot drop-down list.
3. Enter the depot's name and a Depot ID, if desired. Depots IDs are numbered 1 through 32767, and if you do not enter an ID, the system assigns the lowest available ID number to it.

4. Enter the depot's location information and time zone.
5. Click **Save**.

# Create Driver and Vehicle Groups

Groups are used to segregate your fleet when you run reports in HOS. Most reports are run against drivers, so we'll create a driver group.

Because you can't delete drivers from the HOS application, you need a way to hide inactive drivers when you run reports. You should create at least two driver groups- one for active drivers and one for terminated or inactive drivers.

To create a driver group:

1. Click the **Administration** tab; then click **Group**.
2. Ensure **Driver group** is selected. In the drop-down lists, select **Global Groups** for the Depot and **New Group** for the Group.
3. Type your group name.
4. If you created drivers, they appear in the Available members list. Select a driver, then click Add. You can select multiple drivers at one time by holding the CTRL key while selecting driver names.

The screenshot shows the 'Create Group' interface in the HOS application. At the top, there are two radio buttons: 'Driver group' (selected) and 'Vehicle group'. Below these are two dropdown menus: 'Depot' with 'Global Groups' selected and 'Group' with 'New Group' selected. A red asterisk icon is next to the 'Group name' text box. Below the text box is a list of 'Available members' with the following names: Mouse, Jerry; Mullican, Kelly; Murakami, Hideki; and MURPHY, BRYCE. To the right of this list are two buttons: 'Add >>' and '<< Remove'. To the right of these buttons is a 'Selected members' text box. At the bottom right of the form is a 'Save' button. A legend at the bottom left indicates that a red asterisk icon means 'required field'.

5. When you are done selecting members, click **Save**.
6. You can create a group for your inactive drivers just as you did for your active drivers.

To create a vehicle group, select **Vehicle group** and follow the same steps.

## Setup Driver HOS Log Rules

The next step is to set up the way the mobile unit captures HOS logs. For most settings, you can leave the default values. It is important that you review these settings and ensure they are configured to meet your company's needs.

With the ELD mandate, some of these fields will not be appropriate to your fleet until all units are utilizing those settings. Take special note of descriptors that mention ELD.

1. Click the **Administration** tab; then click **HOS Setup**.
2. Review the description for each field and configure the options to best meet your company's needs. Consult with your Customer Experience Representative for specific recommendations.
3. Once you are done, scroll down and click **Save**.
4. In the pop-up window, confirm your changes and click **OK**.



# Configure Drivers in HOS

With the Entity Maintenance Bridge (EMB), Omnitracs shares driver information from the QTRACS application into the Hours of Service application. If you have not already done so, return to the ["QTRACS" on page 14](#) section for information on how to create drivers in QTRACS. Once your drivers have been created, you need to verify the information was successfully passed to HOS and adjust some settings that are added or modified only in the HOS application.

1. From within HOS, click the **Administration** tab; then click **Driver**.
2. In the Depot drop-down list, select **All Drivers**.
3. Select the driver to update from the Driver drop-down list.
4. Review the information that was passed from QTRACS and ensure it is correct.

*Note: If you need to edit or update a driver's details, be sure to make your edits in QTRACS and those changes will be passed to Hours of Service automatically. If you make the edit in HOS, it WILL NOT be passed to QTRACS. It may take a few minutes after creating or editing a driver in QTRACS before the information is passed to HOS.*

5. Select the appropriate values for the following parameters that are only configured in HOS:
  - a. Duty cycle
  - b. Rule set
  - c. Rest break exemption
  - d. Personal conveyance allowance
  - e. U.S. 24 hour reset
  - f. U.S. well-site wait time
  - g. Hazmat allowance
6. Scroll down and identify if the driver must be ELD-compliant or is ELD exempt (like a mechanic).
7. Select the Depot to assign the driver to.
8. Select any groups to assign the driver to.
9. Click **Save**.

# Configure Vehicles in HOS

Vehicles are first created and configured in QTRACS and that information is then automatically passed to HOS. If you have not already done so, return to the "QTRACS" on page 14 section for information on how to create vehicles in QTRACS. Once your vehicles have been created in QTRACS, you need to verify the information was successfully passed to HOS and adjust some settings that are added or modified only in the HOS application.

1. From within HOS, click the **Administration** tab; then click **Vehicle**.
2. Ensure the information passed correctly from QTRACS. Be aware that HOS uses slightly different terminology for some fields.
  - Comm unit # in HOS is equivalent to Serial Number or UA in QTRACS.
  - Tractor ID in HOS is equivalent to Vehicle ID in QTRACS.
  - Vehicle alias in HOS is equivalent to Vehicle name in QTRACS.

*Note: If you need to edit or update a driver's details, be sure to make your edits in QTRACS and those changes will be passed to hours of service automatically. If you make the edit in HOS, it WILL NOT be passed to QTRACS. It may take a few minutes after creating or editing a driver in QTRACS before the information is passed to HOS.*

Depot  Vehicle

<input checked="" type="checkbox"/> Comm unit # <input type="text"/>	The serial # of the vehicle's communication unit.
Vehicle ELD Mode <input checked="" type="radio"/> AOBRD <input type="radio"/> ELD	Select Mobile Hours of Service Operating Mode
<input checked="" type="checkbox"/> Tractor ID <input type="text"/>	Identification number for tractor
VIN <input type="text"/>	Vehicle Identification Number.
Plate Number <input type="text"/>	License plate number required for a vehicle to be driven in Canada
Vehicle alias <input type="text"/>	Apart from its comm unit #, a vehicle may be given a text label to identify it.
Depot name <input type="text" value="Depot"/>	The depot the vehicle is assigned to, if any.
Group(s) <input type="text" value="--- None ---"/>	Group(s) the vehicle is a member of, if any.

= required field

*Note: With ELD you will need to provide the VIN and plate number even though those fields are not currently required.*

3. Choose the depot to assign the vehicle to from the drop-down list. QTRACS does not use depots so all vehicles initially created in QTRACS get assigned to the default "Depot" when passed from QTRACS to HOS.
4. If you created groups as suggested earlier in the process, you will want to add the vehicle to the active group and any other groups that are relevant to that vehicle.
5. Click **Save**.
6. Repeat as necessary for the remaining vehicles in your fleet.

You also need to ensure all of your mobile units are in an operational profile enabled for HOS. For more information see the ["Create and Manage Operational Profiles"](#) on page 12 section.

# Vehicle Inspection Report (VIR)

For instructions and links to how-to videos while using VIR, click **Help** at the top of the page. If you have configuration questions about set up and implement VIR in your company that aren't answered here or in the VIR online help, contact your Omnitrac's Customer Experience Representative (CER) to help you.

There are three steps to setup VIR:

- [Role and User Setup - in the Services Portal](#)
- [Fleet-Wide Configuration](#)
- [Email Notification Configuration](#)

# Role and User Setup

As part of the QTRACS initial setup, you should have created roles for your maintenance team that includes access to VIR and to features within the application. If you haven't done so, go back to ["Set Up Roles and Users"](#) on page 15 for the steps to set up users in QTRACS. Ensure the role you create has the appropriate permissions for your employees' job functions:

- **Can use Vehicle Inspection Report** - Allows access to the application, but not the ability to perform tasks.
- **Can close Vehicle Inspection Report** - Allows the ability to close open defect reports. Grant this permission to your maintenance tech or fleet manager. Grant only this and "Can use Vehicle Inspection Report" VIR permissions to a third-party like a contracted maintenance provider.
- **Can maintain company settings** - Allows full control of VIR. Grant this permission to you safety manager.

Vehicle Inspection Report	
[-] General	
Can use Vehicle Inspection Report	<input type="checkbox"/> Allows user to access Vehicle Inspection Report
Can close Vehicle Inspection Report	<input type="checkbox"/> Allows user to close Vehicle Inspection Report
[-] Administration	
Can maintain company settings	<input type="checkbox"/> Allows user to modify and assign Vehicle Inspection Report forms and manage company users

# Fleet-Wide Configuration

You must specify what your drivers are required to do within the VIR application on their in-cab units.

*Note: Your fleet can run under US rules, Canadian rules, or both, but you must select at least one rule set.*

1. From the VIR Home page, click **Settings**; then click **Configuration**.
2. From the Configuration page, you can set the following:
  - **Mandatory VIR** - All drivers must submit daily VIRs
  - **Driver Alert** - Notify your drivers when a VIR is due
  - **In App Notifications** - Be alerted within the VIR application when a new VIR is received reporting vehicle defects, trailer defects, or all defects
  - **US Rules** - Specify that your drivers are running under US rules (can be selected with Canadian rules)
  - **Canadian Rules** - Specify that your drivers are running under Canadian rules (can be selected with US rules)
3. Click **Submit**.

# Email Notification Configuration

You can have VIR send an email when defects are reported.

1. From the VIR Home page, click **Settings** .
2. Click **Email Notifications**; then click **Add Email Notification**.
3. Type the email address of the user whom you want to receive alerts.
4. Select a **Group Name** and **Time Zone**, identify the type of defect you want this user to see; then click **Add**.

*Note: You may want to consider the time zone of the recipient. Ensure your employee is aware that 7 AM Eastern notifications will arrive at 4 AM for someone in Pacific time.*

If you have questions about sharing data with an outside application or something that wasn't answered here or in VIR's online help, contact your Omnitracs Customer Experience Representative (CER).

# Critical Event Reporting (CER)

Critical Event Reporting, or CER, alerts you when a sensor on the truck reports something that could affect safety. This can be as simple as a hard braking event, or, with added equipment, lane departure and roll stability warnings, following time violations, and forward collision warnings.

When a CER event happens, information is sent about the state of the truck, such as where it was, how fast it was going, and other important information. Like a plane's black box, it captures this information starting five minutes before the event and ending two minutes after it.

Drivers can also manually trigger an event if something happens and they would like to save their driving information for review later.

There are four steps involved in the initial setup of CER:

- ["Role and User Setup" on the next page](#)
- ["Setting Up Filters" on page 42](#)
- ["Setting Up Email Notifications" on page 43](#)
- ["Enabling CER and CER Add Ons" on page 44](#)



# Role and User Setup

As part of the QTRACS initial setup, you should have created roles for your maintenance team that includes access to CER and to features within the application. If you haven't done so, go back to ["Set Up Roles and Users"](#) on page 15 for the steps to set up users in QTRACS. Ensure the role you create has the appropriate permissions for your employees' job functions:

- Under Critical Event Reporting > General, be sure applicable roles are enabled to use Critical Event Reporting. The rest of the General permissions for CER relate to viewing and accessing videos and require subscription to Critical Event Video (CEV) in addition to CER.
- Under Critical Event Reporting > Administration, be sure the appropriate roles have permission to maintain company settings or camera settings as needed.

Critical Event Reporting	
[-] General	
Can use Critical Event Reporting	Allows user to access Critical Event Reporting
Can view Critical Event Videos	Allows user to view video associated with Critical Events
Can download Critical Event Videos	Allows user to download Critical Event Videos to local disk
Can email Critical Event Videos	Allows user to email a hyperlink to a Critical Event Video
Can request prequel/sequel Critical Event Videos	Allows user to request additional video to be attached to the beginning or end of an existing video (MAY INCUR DATA CHARGES)
Can request custom Critical Event Videos	Allows user to request video from a vehicle and a time frame not previously associated with a critical event (MAY INCUR DATA CHARGES)
[-] Administration	
Can maintain company settings	Allows user to create and edit vehicle groups, filter definitions, web service filters and notification settings
Can maintain camera settings	Allows user to change Critical Event Video resolution and the amount of video captured for Critical Events

# Setting Up Filters

Filters allow you to create and edit predefined lists of one or more incident types. In addition, you can specify criteria to make the filter more specific, such as maximum and minimum speed or the number of events that occur in a given period of time. Filters can be applied to notifications, reports, incident searches and, if applicable, to web services.

1. Log into the Services Portal and click **Critical Event Reporting**.
2. Click **Settings**.
3. Click **Add Filter**.
4. Type a name for the filter. Choose a descriptive name to make it easy to find and use.
5. Choose which critical events to include in the filter:
  - a. Click ON or OFF next to a critical event type to toggle it on or off.
  - b. As you enable critical event types, enter filter criteria, such as maximum and minimum speed or the number of events that occur in a given period of time. For some events, you can indicate whether an alert should be triggered if data is missing; for example, if the speed was not recorded for a hard braking event, you can choose whether or not to receive an alert. For more information, hover your cursor over the green quote icon next to the event name.
6. Click **Save**.

For more detailed explanation of each critical event type as well as the additional information required for each event type, see the online help for [Critical Event Reporting Filter Settings](#).

# Setting Up Email Notifications

CER can be configured to automatically send email notifications to anyone you choose. You can also choose whether they receive notifications for all critical events that occur or use filters to send notifications only for critical events that meet certain parameters.

1. Log into Services Portal and click **Critical Event Reporting**.
2. Click **Settings**.
3. Click **Notifications**.
4. Click **Add**.
5. Type the email address for the person or group you want to receive the notification.

*This address is not validated against the list of users who have access to CER. If you enter an email address for a user without access to CER, the user receives an email notification with a link, but cannot log in to CER to view the incident details.*

6. Select a filter from the list to choose which critical events trigger the email notification. Leave the filter blank if you want an email notification sent to the recipient for all critical events.
7. Select a vehicle group to limit the notification to only monitor vehicles in a particular global group. See ["Set Up Global Groups"](#) on page 27 for more information about Global Groups.
8. Identify the time zone for the email recipient. This ensures that the time stamps on incidents are consistent with the recipient's time zone.
9. Click **Save**.

# Enabling CER and CER Add Ons

CER also needs to be enabled on your mobile units through operational profiles. Revisit "[Create and Manage Operational Profiles](#)" on page 12 for information about managing operational profiles.

By default CER only includes hard braking, overspeed, excessive overspeed, and manual critical events. Lane departure warnings, roll stability, following time violations, forward collision warnings, and Critical event Video require additional hardware and sensors to be installed and also require enabling CER add-ons in the operational profile.

Review your operational profiles to ensure CER and any applicable CER add-ons are enabled.

Available Applications	Min. Firmware
<input checked="" type="checkbox"/> CER Add-on - ABS	? NA
<input checked="" type="checkbox"/> CER Add-on - Forward Collision Warning and Follow Time Violation	? NA
<input checked="" type="checkbox"/> CER Add-on - Over Speed Events	? NA
<input type="checkbox"/> CER Add-on - Stability Control and Lane Departure Warning	? NA
<input checked="" type="checkbox"/> CER Add-on – Critical Event Video (CEV): Forward Facing	?
<input checked="" type="checkbox"/> CER Add-on – Critical Event Video (CEV): Inward Facing	?

# Performance Monitoring

Performance Monitoring collects and reports driving behavior that affects safety and fuel consumption. Examples of events that are recorded include speeding, idling, over-revving, and time in cruise control. You can use dashboards and charts in Performance Monitoring to coach drivers that need to improve, and to reward drivers whose driving practices save you money.

Performance Monitoring data is used to analyze driver behavior as a whole, not to pinpoint exact dates and times when a driver was, say, speeding or coasting out of gear. For example, you can easily use the data to coach a driver by showing him a chart of his idling statistics over the last three months and discuss how to improve fuel efficiency by reducing idling.

To get meaningful data, you need to make good decisions about how you want to collect data. The initial setup will give you recommended baseline settings to start with and then you will need to review the data after the first few extracts and adjust the settings as needed for your business needs and goals.

Throughout the setup process, you may need to refer to [this glossary](#) to understand what the various settings do. You can also print the glossary to keep a quick reference for when using Performance Monitoring or access it at anytime from the Performance Monitoring online help.

To set up Performance Monitoring, you must complete four tasks:

- ["Setting the Extract Cycle" on the next page](#)
- ["Set Performance Monitoring Company Settings" on page 48](#)
- ["Create Performance Monitoring Vehicle Types" on page 49](#)
- ["Ensure Vehicles Have Appropriate Parameters" on page 52](#)

# Setting the Extract Cycle

It's important to understand that Performance Monitoring collects and stores performance data on the mobile unit over a specified time, usually seven days. Think of it as a bucket being filled. At the end of the collection period, the data is pulled from each truck; all of the buckets are emptied at the same time. These "buckets" are called **extracts**. To ensure you are gathering useful data on a consistent basis from your trucks, you must configure the extract cycle for your company.

Omnitracs recommends you extract the data from your fleet every seven days. When setting the extract cycle you need to choose a start day and time. Once it begins, the extract process persists for 18 hours to try and reach all vehicles in your fleet that are running Performance Monitoring. You should choose a time that works best for your operations, when most, if not all, of your trucks will be active and able to communicate.

## To Set the Extract Cycle

1. Log into the Services Portal and click **Performance Monitoring**.
2. Click **Setup**.
3. Click **Company Settings**.
4. Set the Extract Configuration settings:
  - **Enable scheduled extracts:** Ensure this box is checked.
  - **Time between extracts:** Enter how often you want the extract to run; Omnitracs recommends 7 days.
  - **Default scheduled cycle time:** Enter the time that you want the extract process to begin in a 24 hour format. Once it begins, it persists for 18 hours so choose a starting time that will allow the process to reach all of your vehicles while they are operational and able to communicate. This varies based on your business and operations but Omnitracs has found that an early morning start time works well for most customers.
  - **Notify overdue extracts:** It is recommended you leave this box unchecked since the notification goes to the vehicle's coverage, who is usually not the Performance Monitoring administrator for most companies.
  - **Notify MCT autoextracts:** Check this box.
  - **Enable host-generated faults:** Leave this box unchecked.
5. Click **Save**.

Extract Configuration
?

Enable scheduled extracts:

\* Time between extracts:  days (7 - 999)

\* Default scheduled cycle time:  (hh:mm)

Notify overdue extracts:

Notify MCT autoextracts:

Enable host-generated faults:

Check to automatically poll all vehicles for performance information at the start of the next cycle.  
The length of time between extractions for all vehicles in the fleet

The hour and minute for the extraction

Check to notify QTRACS coverage groups of any extraction requests that do not complete.

Check to notify QTRACS coverage groups of exception-based extracts from the vehicle's mobile unit.

Check to create non-mobile (host) faults as extractions are received.

+ Reports ?

+ Alerts ?

+ Data Purge Parameters

+ Fuel Efficiency Parameters ?

+ Matrix Report Preferences ?

Some changes may not take effect until the next time the user logs in.

Cancel Save

6. In the banner, hover over **Select Other** and in the drop-down menu click **Performance Monitoring**.
7. Click **Vehicles**.
8. In the upper left click the hyperlinked date or time in Scheduled Extract Cycles.
9. Enter the date and time you want your next extract to run. This is how you choose which day of the week for the extract to run on and the extract will repeat based on the time between extracts setting you previously configured.
10. Click **Save**.

# Set Performance Monitoring Company Settings

Once you have the extract cycle set, you need to configure the rest of the Performance Monitoring Company Settings.

1. From within Performance Monitoring, click **Setup**.
2. Click **Company Settings**.
3. Make the following adjustments:
  - a. **Reports:** Select the user that will manage auto-generated reports, usually your Performance Monitoring administrator.
  - b. **Alerts:** Select the user that will receive any Performance Monitoring related alerts or notifications, usually your Performance Monitoring administrator.
  - c. **Data Purge Parameters:** Recommend you set this to the maximum 730 days. Every month is unique so it's important to be able to compare months across a few years to get the most value from the data.
  - d. **Fuel Efficiency Parameters:** Except for the three categories identified below, it is recommended you leave the default values. You will only see the CNG column if you have CNG vehicles in your fleet.
    - **Idle fuel consumption:** Diesel - 0.6
    - **Cruise Control savings:** Diesel - 0.4
    - **Top Gear savings:** Diesel - 0.5
  - e. **Matrix Report Preferences:** It is recommended to leave the default values spread across all 23 columns.; this allows you to see the most amount of data.
4. Click **Save**.



# Create Performance Monitoring Vehicle Types

Vehicle parameter types define the performance standard for the vehicles assigned to that type. These parameter settings affect the usefulness of reports and queries. When you first enable Performance Monitoring, the default vehicle type is "Rsv," which does not report data. You need to create a vehicle type and mark it as the default so it is automatically assigned when a new vehicle is created in Performance Monitoring.

Create vehicle types based on differences in road speed setting or over rev settings, not based on actual engine types (i.e. Peterbilt vs. Cummins). Recommended vehicle types are:

- Engine governor speed
- RPM settings
- Operation (reefer, bulk, ltl, etc.)

## Create a new vehicle type

1. From within Performance Monitoring, click **Setup**.
2. Click **Vehicle Types**.
3. Click **Add vehicle type**.
4. Enter a three character Vehicle Type ID. Keep it simple so you can easily identify the vehicle type later when assigning a type to a vehicle.
5. Enter a description of the vehicle type to clearly identify what types of vehicles it should be applied to.
6. Make the following adjustments in each tab:
  - a. **Data Source:** Do not change anything in this tab, it applies to older hardware that is no longer in service.
  - b. **Mobile Behavior:**
    - i. Set the auto extract field to one day greater than your extract schedule. This ensures that if a vehicle does not communicate during the extract schedule, it will attempt to send its data the next day when it powers up.
    - ii. Leave all other fields unchecked and set to 0.
  - c. **Fault Monitoring:** Omnitrac's recommends you disable all of these settings.
  - d. **Performance Monitoring:** This is the most important tab for creating a vehicle type. Pay particular attention to the settings in bold below as these are the most important settings for helping you gather useful data. The settings listed are Omnitrac's recommended settings.
    - i. Minimum Warm-up: 1 minute
    - ii. **Maximum Warm-up: 5 minutes**
    - iii. Minimum Cool-down: 1 minute
    - iv. **Maximum Cool-down: 5 minutes**

*Note: The warm-up and cool-down settings set the period of time that does not count against driver or vehicle performance.*

- v. Extended Idle Threshold: Initially set to 60 minutes then adjust later once you have more data and a better idea of what works best for your business needs.
- vi. **Over Speed Threshold: Set to 1 mph/kph above the engine's governor speed. This setting is based on throttle pressure and is useful for policing the engine's governor.**
- vii. **Excessive Speed Threshold: Start at 5 mph/10 kph above the over speed threshold then adjust as you have more data. This setting monitors actual speed, not throttle pressure.**
- viii. **Over RPM Threshold: This setting varies based on engine specifications. Set this based on the RPM at which point mpg begins to be negatively impacted. Consult your vehicle/engine manufacturer for ideal settings.**
- ix. Begin Trip Threshold: Leave at default settings. Be aware that this setting has no relation to Hours of Service.
- x. End Trip Threshold: Leave at default settings. Be aware that this setting has no relation to Hours of Service.
- xi. Ignition Violation Time: 10 minutes
- xii. PTO Enable: This setting requires additional third-party hardware. If using third-party PTO hardware, check this box to set the start-up time, which determines how long PTO has to be enabled before it is recorded as engaged.

7. Click **Save**.

## Setting Default Vehicle Type

All vehicles enabled for Performance Monitoring pull in the default vehicle type parameters. The first new vehicle type you create will automatically become your default vehicle type. If you create multiple vehicle types you will need to choose which one should be the default. To change the default vehicle type:

1. Select the vehicle type you want to make the default from the vehicle type list on the left.
2. Click the downward facing arrow in the upper right of the vehicle type pane.
3. Click **Set as default**.

## Fleetwide Overrange Parameters

Fleetwide Overrange Parameters are used to specify fleetwide exception thresholds for automatic data extraction. For example, if a driver exceeds your over speed time or percentage threshold, the mobile unit

automatically triggers a data extract. If a setting is set to 0, that disables the trigger. Omnitrac recommends leaving these at the default settings initially until you have had a few extracts and then adjust based on your business needs.

*Note: Be aware that an automatic extract does not reset the regular extraction cycle and does not include a performance matrix.*

## Ensure Vehicles Have Appropriate Parameters

Vehicles are automatically created in Performance Monitoring once they are added to QTRACS. This means there is no need to set up vehicles within Performance Monitoring but you do need to ensure that vehicles have the appropriate parameters, which are based on the vehicle type assigned to the vehicles. When you change the parameters for a vehicle type, those changes are automatically sent to all vehicles assigned to that vehicle type.

New vehicles are automatically assigned to the default vehicle type. If you installed mobile units into vehicles and powered the units on before creating your vehicle types, those vehicles were automatically assigned to the Rsv vehicle type, which does not report any data. If you created a new vehicle type, you need to assign vehicles to that vehicle type. These changes must be made on an individual vehicle basis.

To change a vehicle's type:

1. From within Performance Monitoring, click **Vehicles**.
2. Find the vehicle in the vehicle list on the left and click it.
3. In the upper right corner of the vehicle details pane, click **edit**.
4. Click the **Type** drop-down list and select the new vehicle type you want assigned to the vehicle.
5. In the upper right corner of the vehicle details pane, click **Save**.

*If new parameters fail to send to a vehicle due to it being out of communication, select the vehicle then click Resend Parameters to send again. It is important that all vehicles have valid and current parameters to ensure you receive useful data. Vehicles marked with a red dot in the vehicle list either did not successfully send an extract or did not successfully receive parameters.*