

## System Admin Getting Started: Initial Setup

**BEFORE YOU BEGIN USING THE SYSTEM**, you must complete initial configuration. Your Customer Service Rep (CSR) will help you make decisions to use the system effectively. For help while completing tasks, click ? for field level descriptions or **Help** at the top of the page for procedures.

**OMNITRACS SERVICES PORTAL URL:** <https://services.omnitrac.com/>

### SET UP USERS

One system administrator user is set up for you; your CSR gives you the login ID and password. There are three tasks:

- **Set up roles:** Create sets of permissions based on user roles, such as Dispatcher and Safety Manager.
- **Set new user defaults:** Identify the default role and preferences assigned during new user creation.
- **Set up users:** Create users and adjust the default role and preferences as appropriate.
  1. Log in to the Services Portal web site using the credentials supplied by your CSR.
  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.

### CONFIGURE COMPANY SETTINGS

1. In Administration, click **Company Settings**, then click **General Company Settings**.
2. Enter your company-wide information and preferences and click **Save**.
3. Click **Trailer Tracks Settings**.
4. Set your system, untethered trailer and reefer, alert, data retention, dormancy, and geofence preferences and defaults and click **Save**.

### SET UP USER GROUPS

Create, view, and edit user groups that are used for notification of Trailer Tracks alerts.

1. Click **Setup, User Groups**.
2. Click **Add new user group**.
3. Type a **Group name**, **Description**, and choose users.
4. Click **save**.

### SET UP MONITORING PLANS

Create or edit basic information about a monitoring plan for status reporting intervals, connect/disconnect events, sensor event triggers and actions such as door open/close, and alert conditions and priorities for three recipients. For example, a cargo unloaded alert may be high priority for the trailer manager and a low priority for the optional group.

1. Click **Setup, Monitoring Plans**.
2. Click **Add new monitoring plan**. The tabs appear based on the types of trailers in your fleet.
3. Set Basic Configuration settings.
4. Click the Configuration or Advanced Configuration tab and select settings. For more information, click ?.
5. Click the Alert Notification tab and set priorities for conditions for the user groups created in the previous step.
6. Click **save**.

## System Admin Getting Started: Initial Setup

For help while completing tasks, click ? for field level descriptions or **Help** at the top of the page for procedures.

**OMNITRACS SERVICES PORTAL URL:** <https://services.omnitracs.com/>

### SET TRAILER TYPES

Edit existing trailer types and create new types. The trailer type ID can't be changed.

1. Click **Setup, Trailer Types**.
2. Click **Add new trailer type**.
3. Type the ID and description and select monitoring plans. Indicate if this type is multi-unit capable.
4. Click **Save**.

The remaining setup steps are optional and can be set up when needed.

### CREATE SCACs

Create Standard Carrier Alpha Codes (SCAC). These codes are assigned by the National Motor Freight Traffic Association (NMFTA) and uniquely identify every freight carrier in North America.

1. Click **Setup, SCACs**.
2. Click **Add new SCAC**.
3. Type the SCAC and description and check if it is a foreign SCAC (trailer outside your fleet).
4. Click **Save**.

### SET UP CUSTOM LANDMARKS

Define your points of interest based on industry standard landmark types and attributes. To get started, review the available types and associated attributes in the online [Dictionary](#).

To create a landmark:

1. Click **Landmarks**, then click **Add new landmark**.
2. Select the landmark type.
3. Type the address or geographical coordinates.
4. Click **Submit**. Trailer Tracks software 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**.

## Getting Started: Daily Tasks

**TO RECEIVE NOTIFICATION OF ALERTS**, configure the Notifier window in your user preferences. On the **Alerts** tab, enable at least one priority level to **Receive in Notifier window**.

**OMNITRACS SERVICES PORTAL URL:** <https://services.omnitracs.com/>

### VIEWING ALERTS

Alert details provide information about the alert and who received notification of the alert. You can also view the trailer's location on the map at the time the event occurred by clicking the Position for alert link.

1. Click **Alerts**.
2. Type or select criteria and click **Search**.
3. Click the alert text. Click linked text to display more details.
4. To acknowledge an alert, click **Acknowledge**.

### ASSESS TRAILER UTILIZATION

1. Click **Dashboard**.
2. Review the Fleet Status section and the utilization and dormancy charts.

**OR**

1. Click the **Queries** tab.
2. Click the **Utilization** tab.
3. Select the trailer type from the **Show Only** drop-down list.
4. Type the number of hours of utilization.
5. Select the date range.
6. Click **Search**.
7. Click  to export the results to a CSV file.

### SEARCH FOR TRAILERS

1. Click **Dashboard**.
2. Type the trailer ID and click **Go**.

**OR**

1. Click **Trailers**.
2. Type the landmark name, the asset ID, or address.
3. Select dormant or active.
4. Click **More Options** and choose filtering criteria.
5. Click **Search**.

## Getting Started: Daily Tasks

For help while completing tasks, click ? for field level descriptions or **Help** at the top of the page for procedures.

**OMNITRACS SERVICES PORTAL URL:** <https://services.omnitracs.com/>

### VIEW TRAILER STATUS AND POSITION

You can view trailer information and status from the list of trailers.

1. Click the **Trailers** tab.
2. Locate the trailer whose status you want to view in the list and click its ID.

The map zooms to the trailer's current position. Trailer details appear below the map. Position details appear at the top.

### EDIT TRAILER/DELETE TRAILER

If you have the administrative permission to manage trailers, you can change their settings. When the new settings are sent, the trailer's status in the Set Up Trailers list changes to Pending. If the new settings are not successfully sent to the trailer, the status changes to Failed.

1. Click the **Trailers** tab.
2. Locate the trailer you want to change in the list and click its ID.
3. Click the **Settings** tab, **Mobile Unit** sub-tab.
4. Click **edit**.
5. Enter the new trailer information and click **save**.

**To delete a trailer:** Click **delete** above the trailer details, Settings, Mobile Unit tab.

### PING A TRAILER

To see the current status of the trailer's sensors and current location, and retrieve any queued messages, you can ping the trailer. When you ping a trailer, the system sends any parameter changes to the terminal immediately.

1. Click the **Trailers** tab.
2. Locate the trailer to ping in the list and click its ID.
3. Click **Ping** below the details panel.

### FIND LANDMARKS NEAR A TRAILER

You may need to find a landmark that is near a trailer to determine where the trailer could be swapped or how far it is from a customer site.

1. Click the **Trailers** tab.
2. Locate the trailer in the list and click its ID.
3. Click **Closest Landmarks** in the panel that opens below the map.

All landmark types within 25 miles of the selected trailer display. To view other landmarks, specify a landmark type and/or change the radius and click **Go**. A list shows the landmark ID, type, and distance/direction from the trailer.