STATE AUTO
SAFETY
360
FLEET

1.

Fleet Portal
Manual

Powered By
OCTO

Index

1. How to log on to the Fleet Application

Fleet managers will receive a web URL, username and password via email to log on to the Fleet Dashboard, you just visit the URL to enter the provided username and password and click **Login.**

2. Dashboard

This page contains a set of brief parameters and statistical charts for the fleet.

You can filter this info using the options on the left sidebar to narrow the results down to the data you'd like to view.

Dashboard options include: select a fleet, a group, certain vehicles, certain drivers and a period of time.

For example, this screen shows a possible selection of a fleet with all vehicles and drivers in the group for a month-long period.
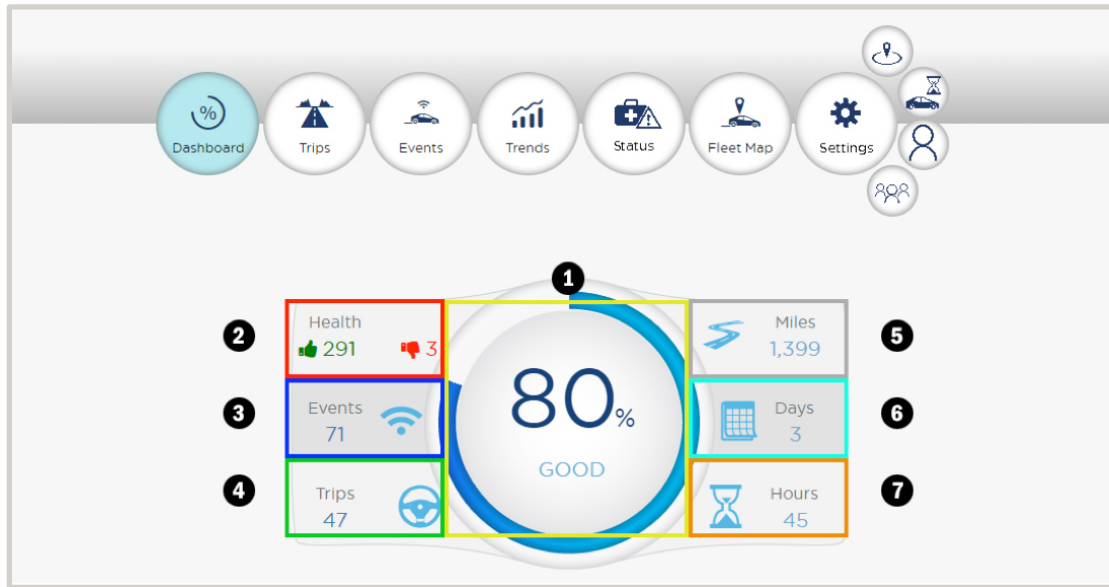
1. Score: associated with driving behaviors

2. Health: reports vehicle diagnostics

3. Events: number of events

4. Trips: number of trips

5. Miles: number of miles

6. Days: the number of days with a trip

7. Hours: the duration of all trips in hours

Here you can view how many risky events there have been in the time parameter defined on the left. If nothing is changed on the left, the behaviors will be an aggregate view. To view more detailed information about the events, check out the Events tab explained in a future section.
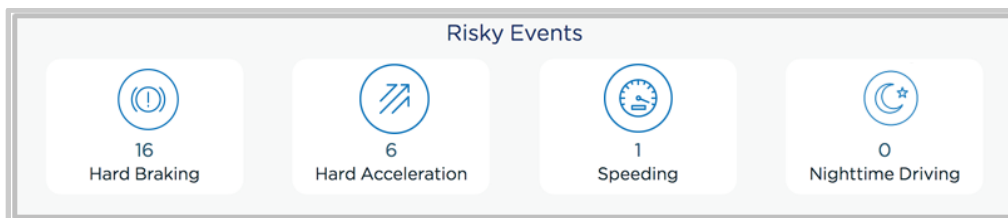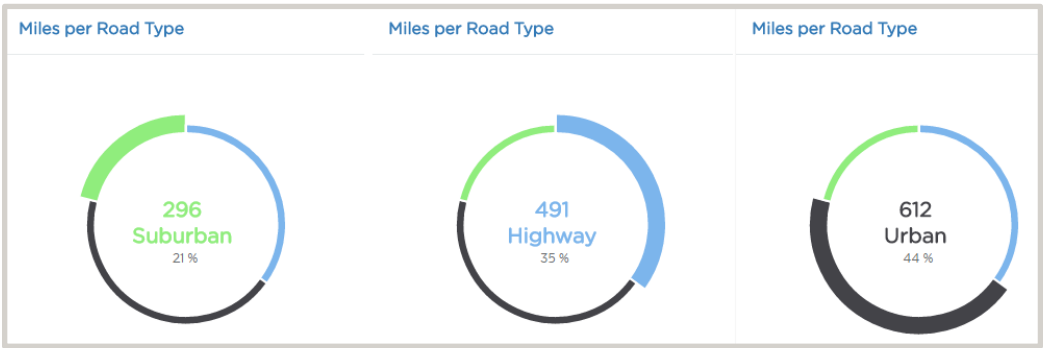
Here you can view different interactive charts:
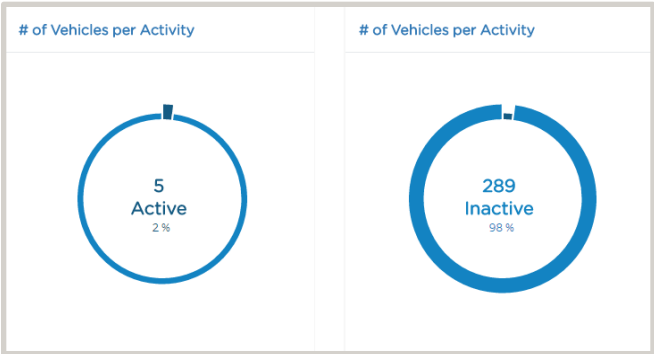
You review the list of vehicles and their status by clicking on the chart.

From this list, you can view the group, manager, year, make and model of the vehicle, license plate number, the VIN, the driver and last position time.
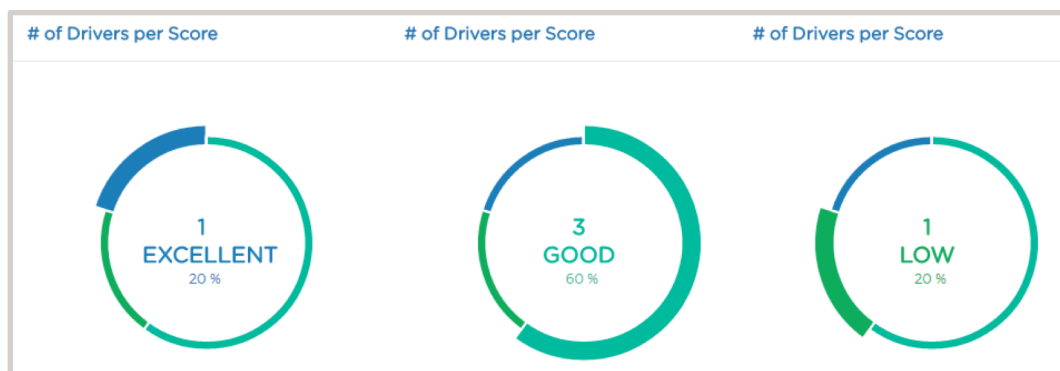
Initially, the charts show the number and percentage of miles driven by road type. By clicking on the figure, you will find the list of vehicles with the miles driven and the duration of the trip.

From this list, you can view the group, the manager, the model of the vehicle with the plate, the VIN, the driver, miles, duration, costs and consumption of CO2.
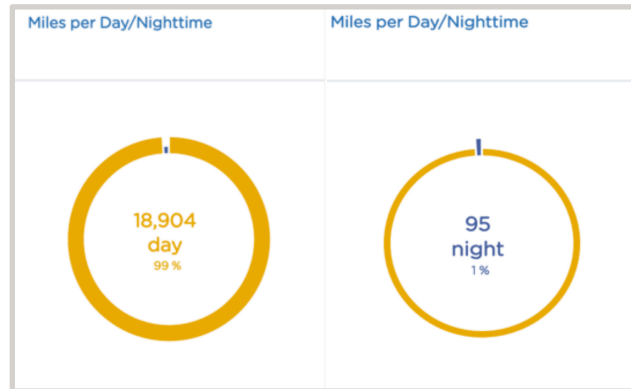

The next chart displays the score of the drivers. By clicking on the chart, you can obtain the following details:

You can look at the group, the manager, the model of the vehicle with the license plate number, the VIN, the driver, driver score and description.

This chart displays the number and percentage of miles driven by day and by night.
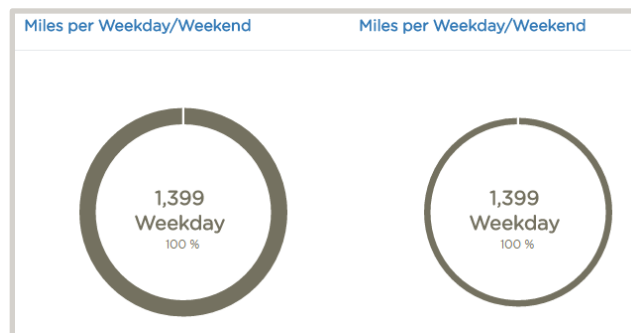By clicking on the chart, you'll get the following details:

The chart below displays the number and percentage of miles driven during weekdays and during the weekend:

Click on the chart to see the following details:

Night and day driving
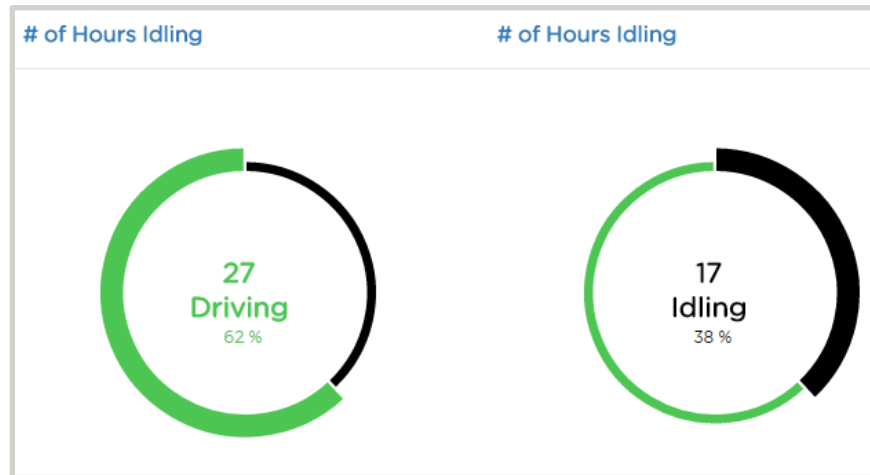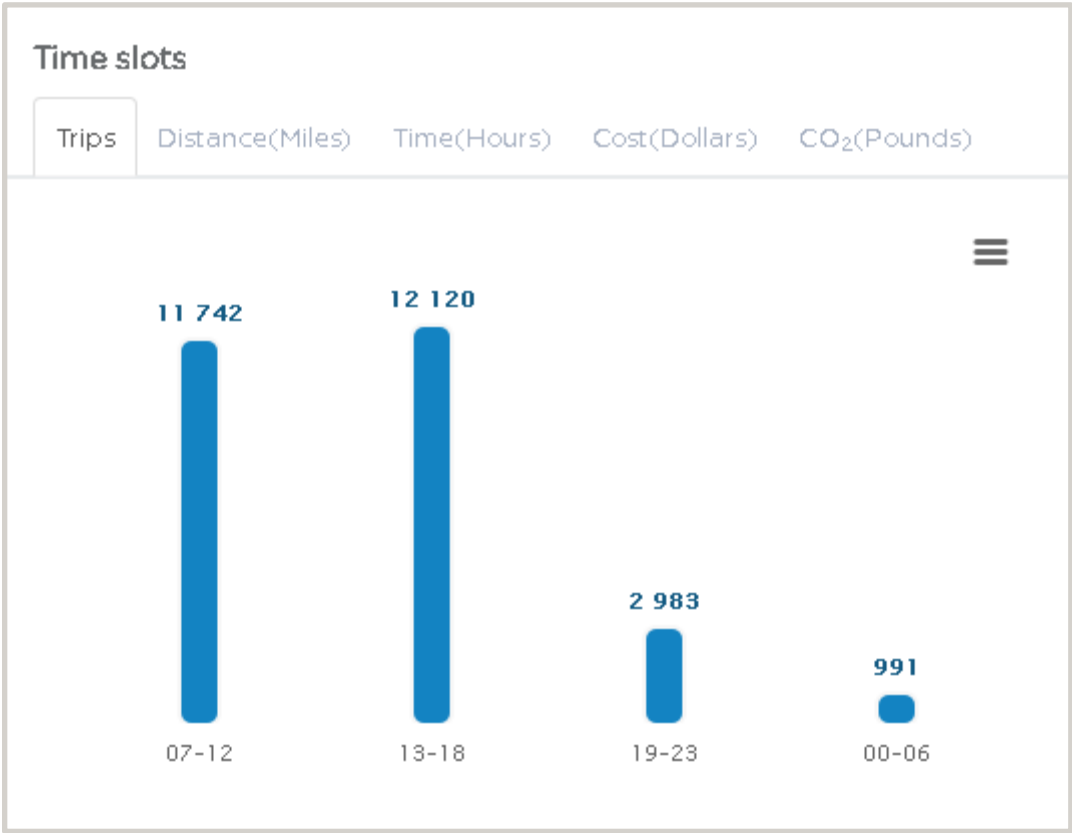Dashboard / weekday and weekand / Weekday

Search									Search
Group ⇕	Manager ⇕	Vehicle ⇕	Plate	VIN	Driver ⇕	Miles ⇕	Dur ⇕	Cost ⇕	CO2 ⇕
						1,995.00	158 hours, 28 mins	--	--
						1,845.00	78 hours, 47 mins	--	--

# of Hours Idling   # of Hours Idling

27
Driving
62 %

17
Idling
38 %

This chart above displays the hours and percentage of driving and idling time.

This information will be displayed when you click on the chart:

Idle driving
Dashboard / Idle and moving / Moving

Search								Search
Group ⇕	Manager ⇕	Vehicle ⇕	Plate	VIN	Driver ⇕	Dur ⇕	Cost ⇕	CO2 ⇕
						54 hours, 18 mins	0	0
						43 hours, 3 mins	0	0
						18 hours, 6 mins	0	0

Time slots

| Trips | Distance(Miles) | Time(Hours) | Cost(Dollars) | CO₂(Pounds) |

This chart shows trip statistics, distance, time, cost and CO_2 consumption, based on the time slot. By clicking on the time slot, you can see the details below:

Time slots

Dashboard / Time slots / 13-18

| Search | | | | | | | | Search |

Group ⇕	Manager ⇕	Vehicle ⇕	Plate	VIN	Driver ⇕	Trips ⇕	Miles ⇕	Duration ⇕
						26	204.00	19 hours, 44 mins
						36	398.00	22 hours, 31 mins
						13	371.00	9 hours, 9 mins
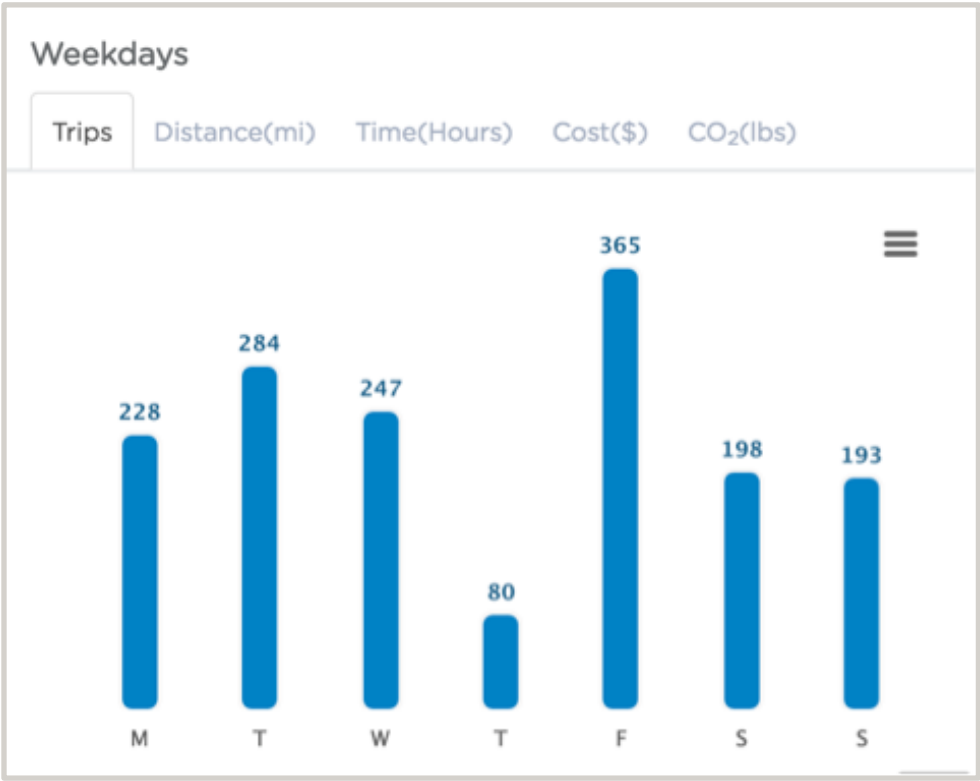
This chart shows trip statistics, distance, time, cost and CO_2 consumption, based on the day of the week. By clicking on a particular day, you can see the details below:
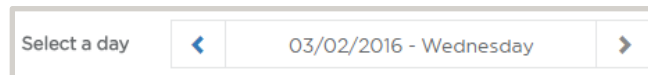
3. Trips

This section contains a short summary (red box in figure below) about all the trips for the selected filters, and the list of trips for the first day (yellow box in figure below) in which a trip was recorded.
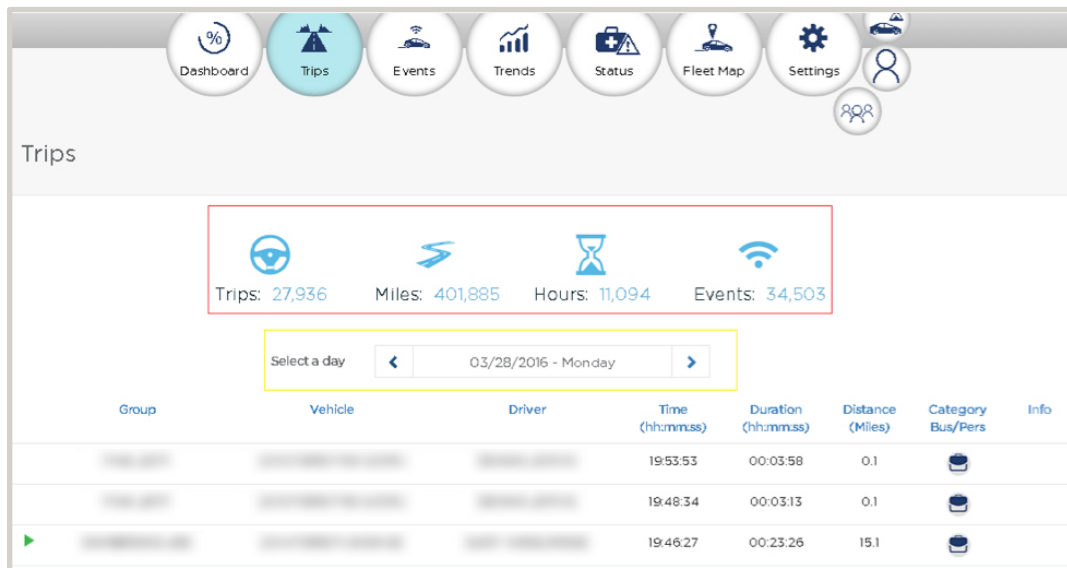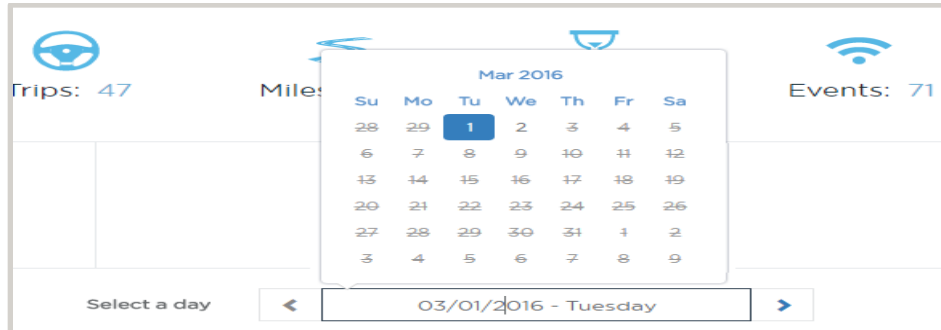

A different day can be selected by clicking on the arrows:

If you want to see a specific date, click on the date field and choose a day from the date picker:
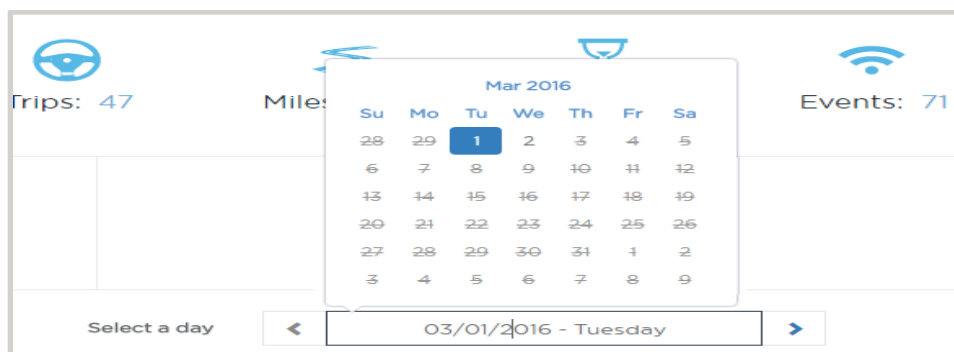
In the list, a colored arrow in the first column means one or more events are present for the trip. The arrow color depends on the intensity of the event. By clicking on the arrow you can see the events list:

By clicking on a trip row from the list, the entire trip is displayed on the map as shown in the figure below:
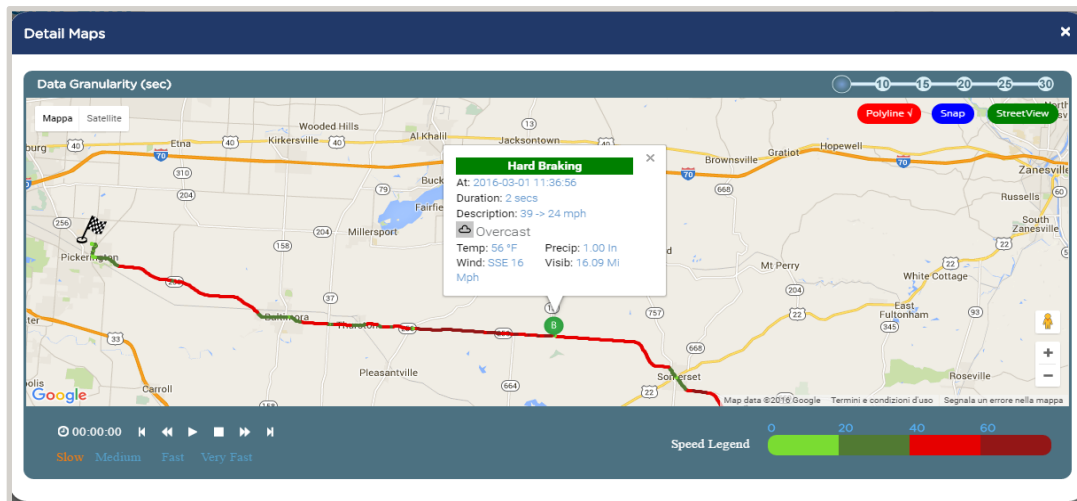
On the map, the line color depends on the speed of the car at that position, according to the speed legend located in the bottom right corner.

All events that happened during the trip are displayed with details in an information window, including the weather conditions during that event.

By clicking on "Play," you can follow step-by-step stages of the journey.
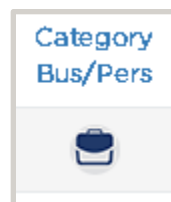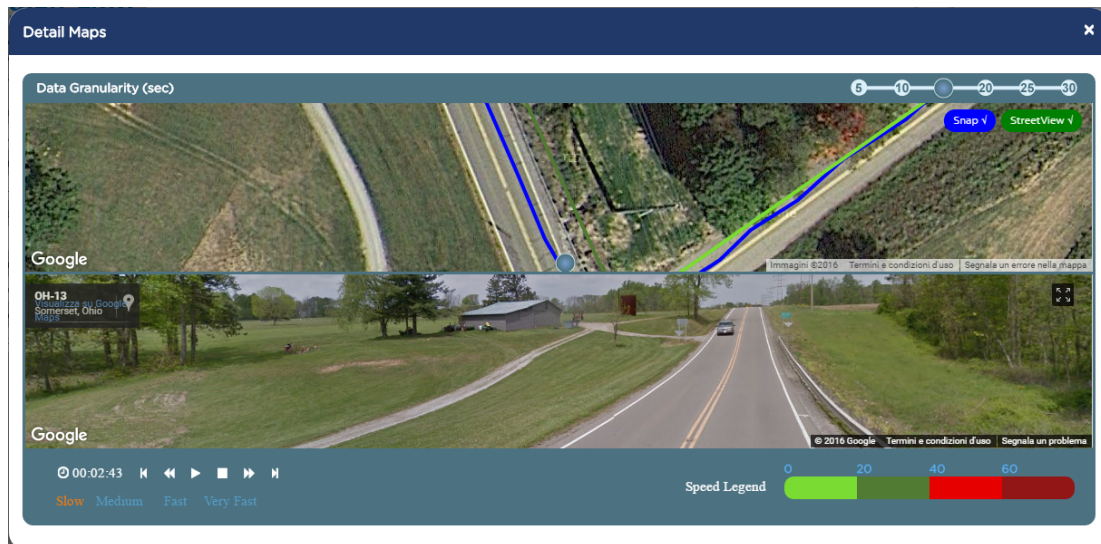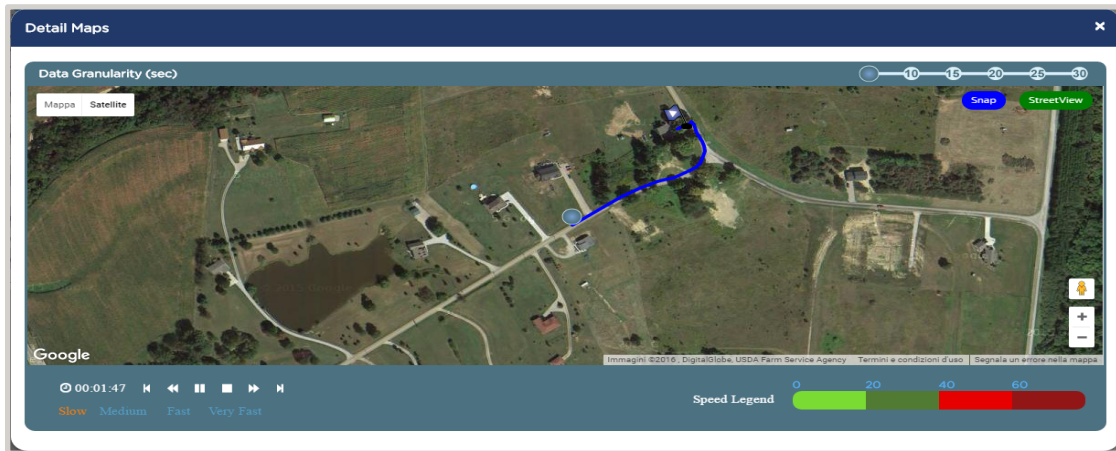
This icon allows you to change the type of journey to business or personal at any time.

4. Events

This section contains a short summary (red box in figure below) about all the trips for the selected filters, and the list of events for the first day (yellow box in figure below) in which a trip was recorded.
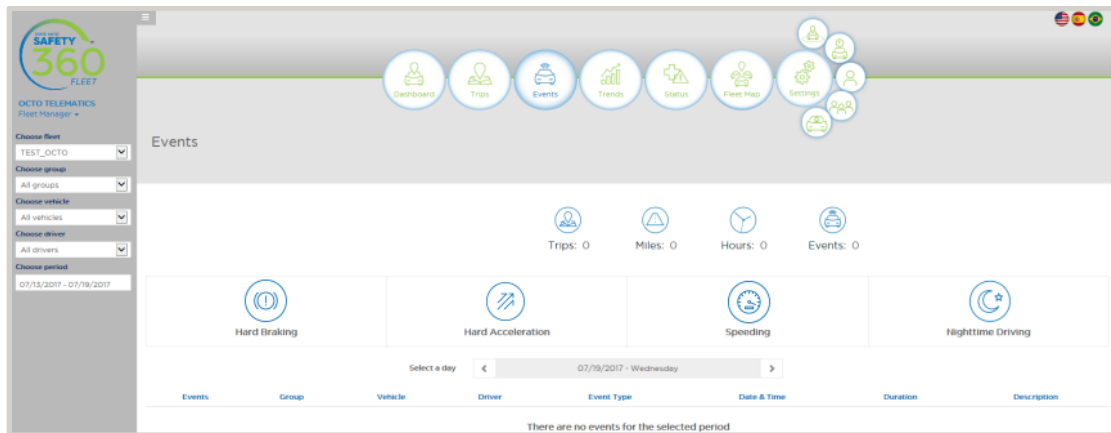
By clicking on these images, the event list will be filtered by the selected event types:
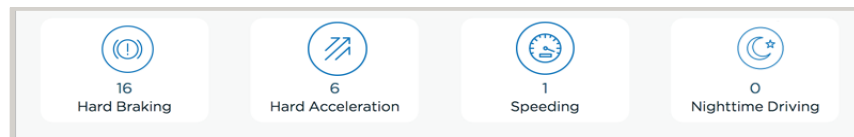
You can select a different day by using the arrows:

Or, you can also click on the date field to choose a day from the date picker:

To view the entire trip on the map, click on a row in the event list as per the figure below, where the selected event is highlighted.
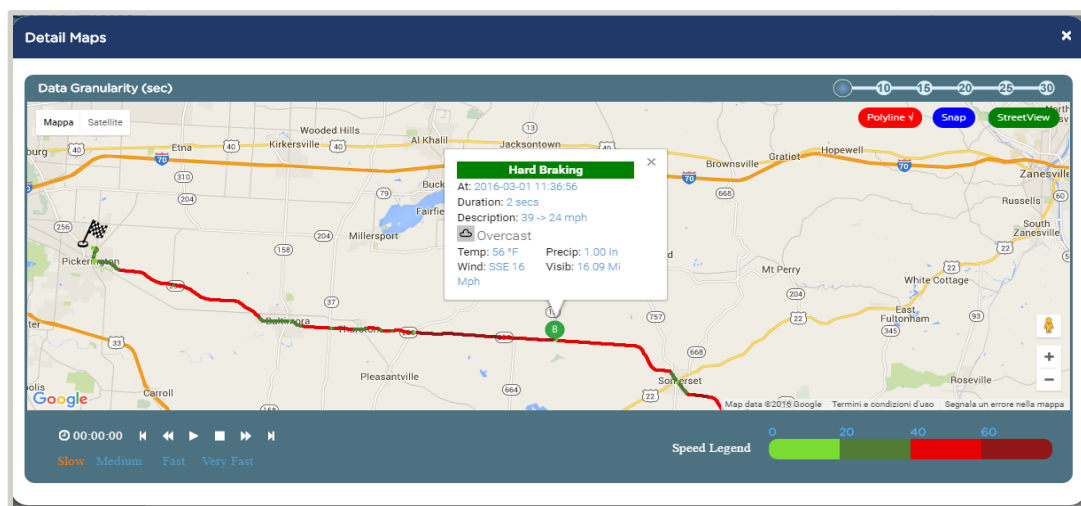
In this example, the map shows the entire route, highlighting the maximum braking point with all event details. The information window of the event reports all event details, including weather info.
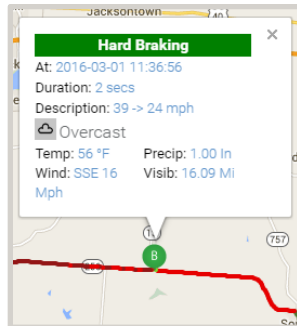
You can follow step-by-step stages of the journey by clicking the "Play" button.
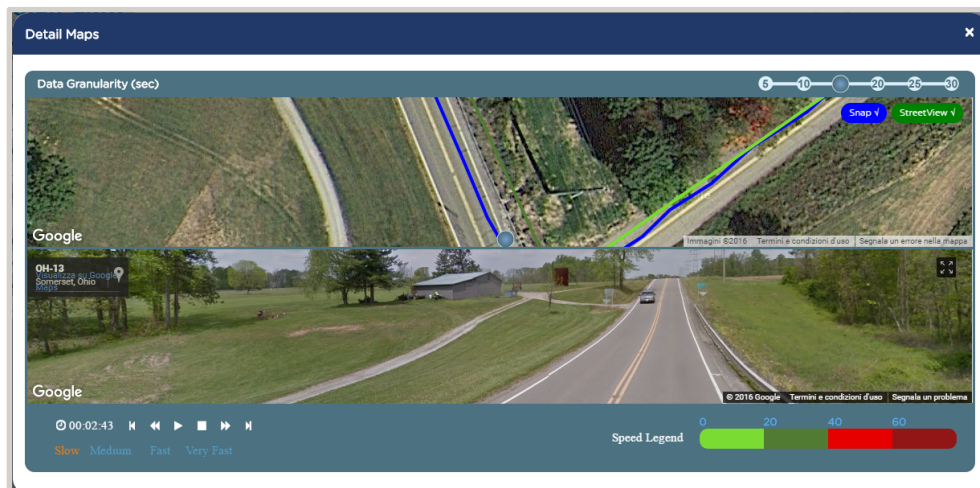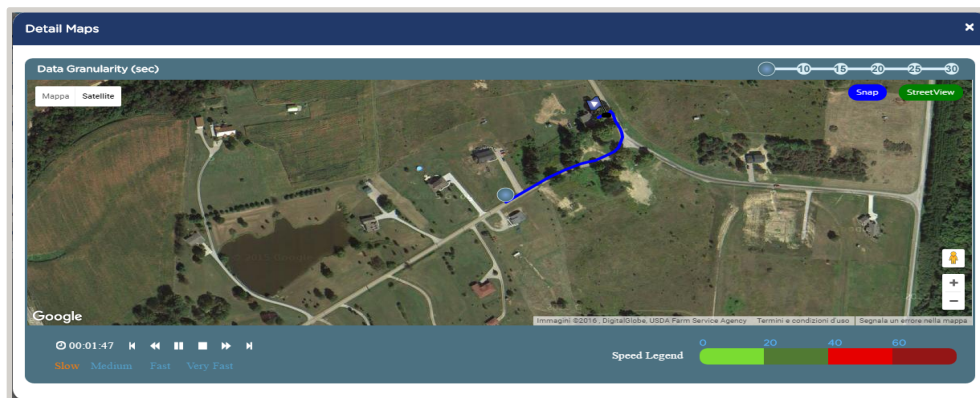
5. Health

This section provides:

1. A list of anomalies:

   DTC - Diagnostic trouble code

   Tampering - Occurs when the device is unplugged while car is being driven, and device is plugged back in after one or multiple trips.

   VIN mismatch - If the device is plugged into the wrong vehicle, the vehicle will be listed under VIN Mismatch and show the registered VIN vs. the detected VIN.

   Connect/Disconnect - Occurs when the device is unplugged from the vehicle, but no trips are taken, for example, during a state inspection or repair.
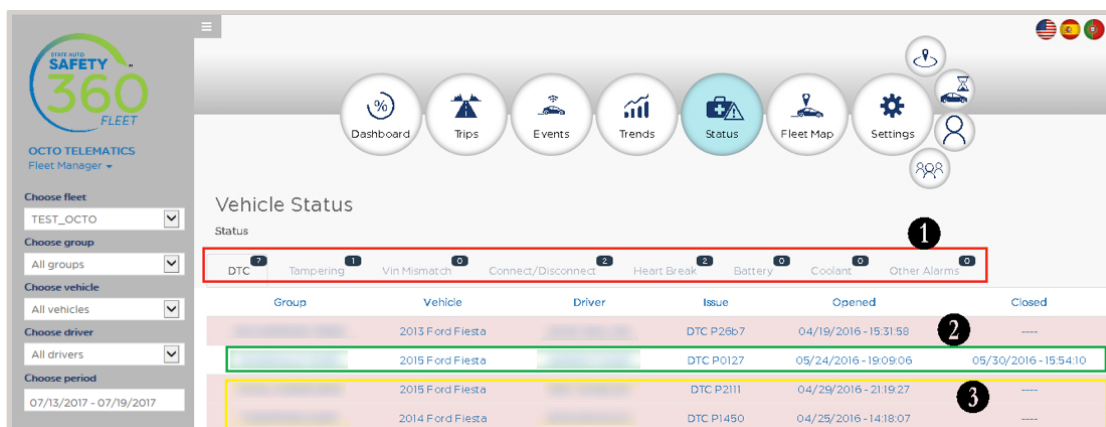
   Heart break - Occurs when there is no response or data found being collected from the device.

   Battery - The driver receives three alerts based on the level of voltage to ensure he/she has sufficient warning.

   Coolant - User is alerted when the coolant gets below a certain value.

   Other alarms - Includes other alarms such as "No GPS Position."
2. The closed anomalies
3. The open anomalies

While the DTC tab is highlighted, you can click on a row to get the DTC (diagnostic trouble code) details.

6. Trends

By clicking on "Trends" from the main menu, you can see the list of reported statistics on the left side, and their respective graphics and charts on the right:
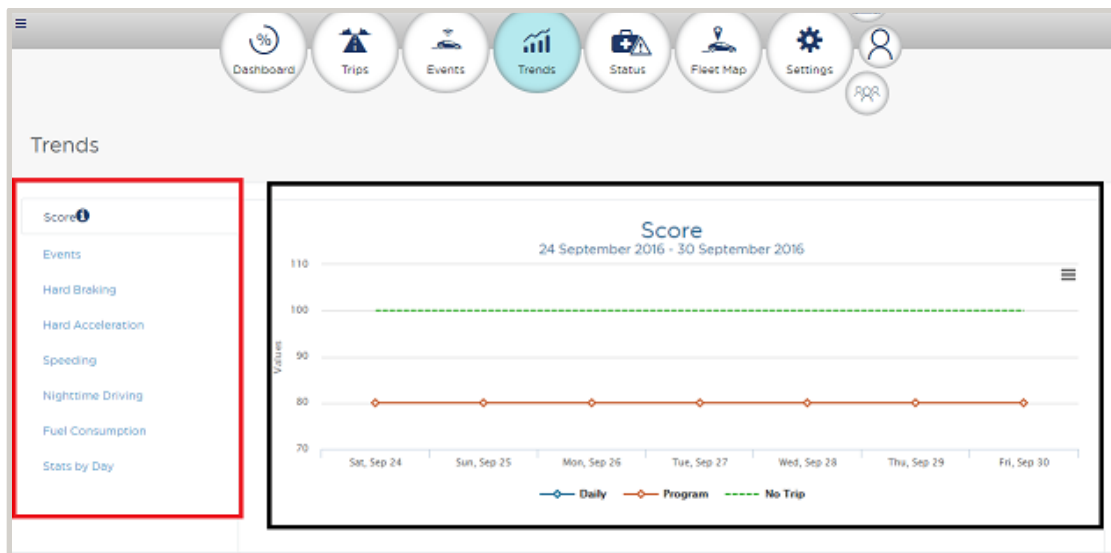
7. Fleet Map

When the Fleet Map icon is selected from the main menu, you can see the information outlined below:
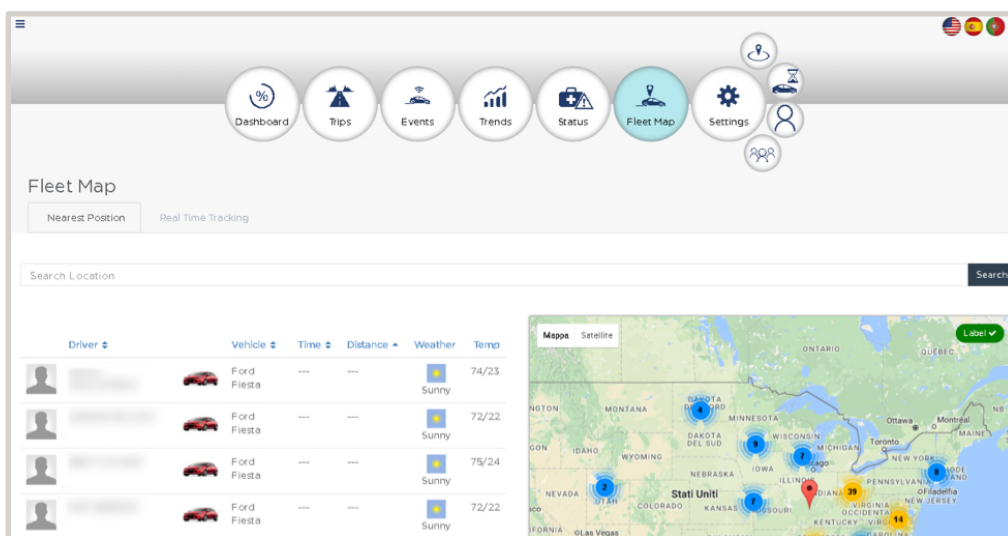
Here is a map with all the known last positions of each of the vehicles.

In the left grid, there is a list of the first 10 cars nearest the relative center point to all the other positions. The center position is marked on the map with a red pointer.

Through the search box on the top of the page, set a position by just typing the name of the business, address and point of interest. Then, the red pointer on the map will point to the selected place and the map will zoom around it.
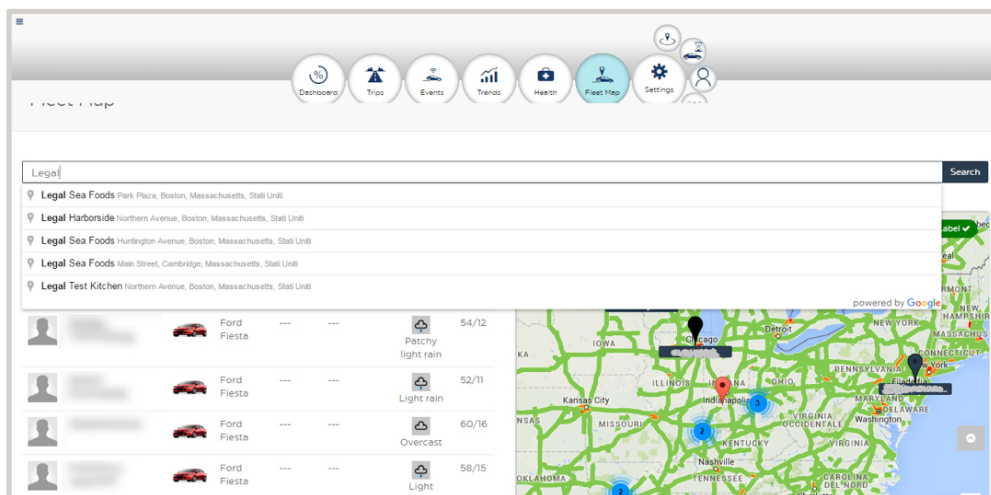
From there, a "Calculate Distances" button will appear, as shown in the image below:
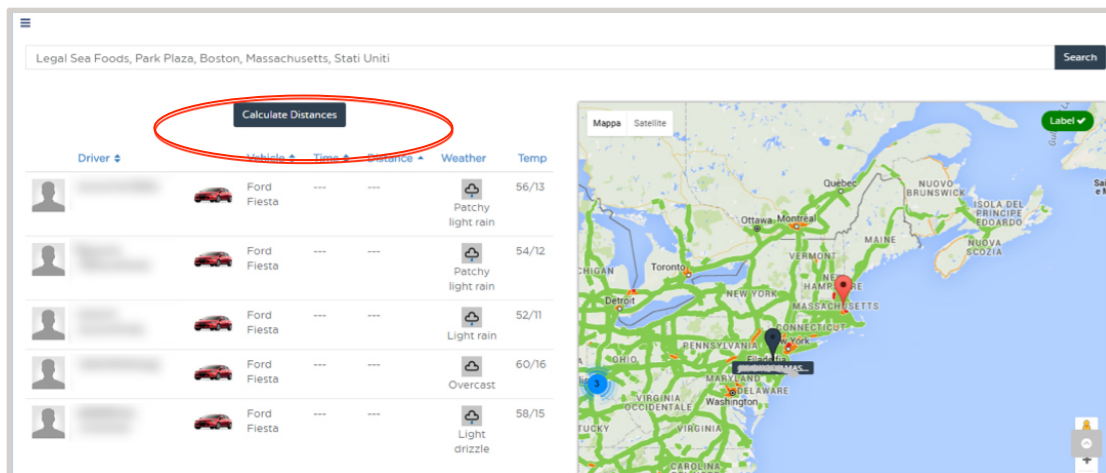
Clicking on the "Calculate Distances" button will create a list of the first 10 cars nearest to the point selected with details on distance and estimated time to arrive to the selected destination.
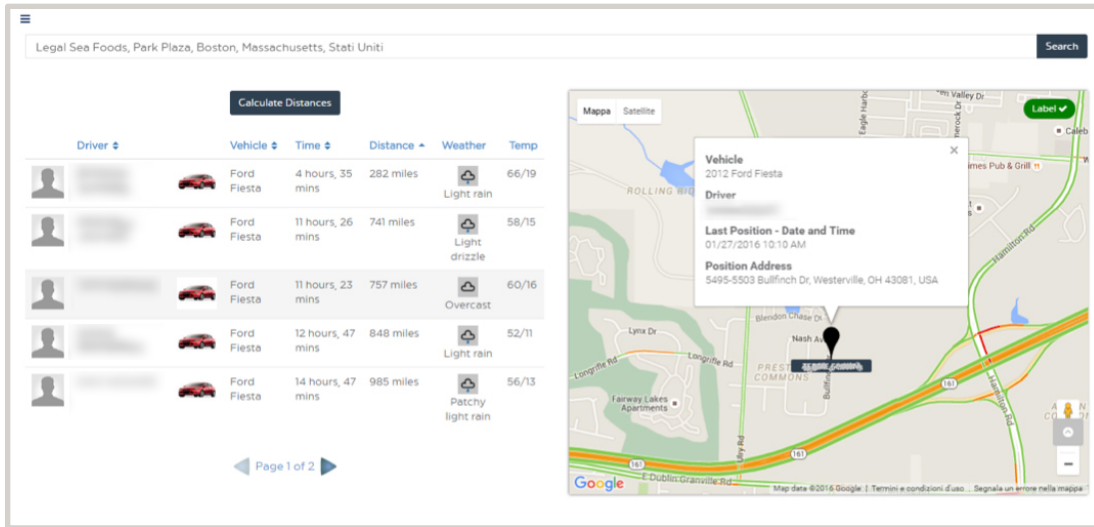
The time and distance are calculated by Google by taking into consideration the best path and traffic conditions.

In addition, actual weather conditions are displayed for every row:
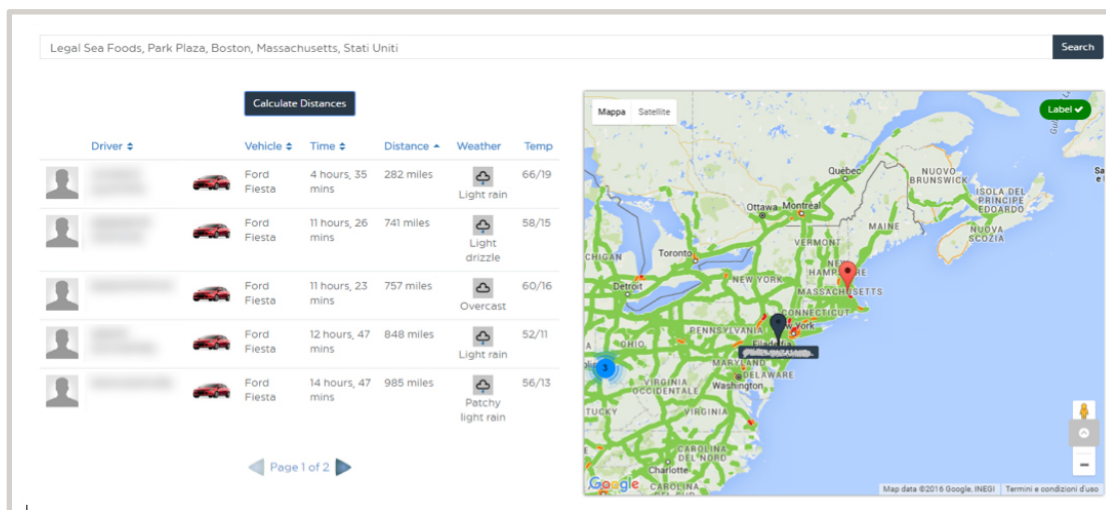
You can sort the list by Driver, Vehicle, Time or Distance.

In addition, you can click on a row and view a detailed info window, as seen in the image below:
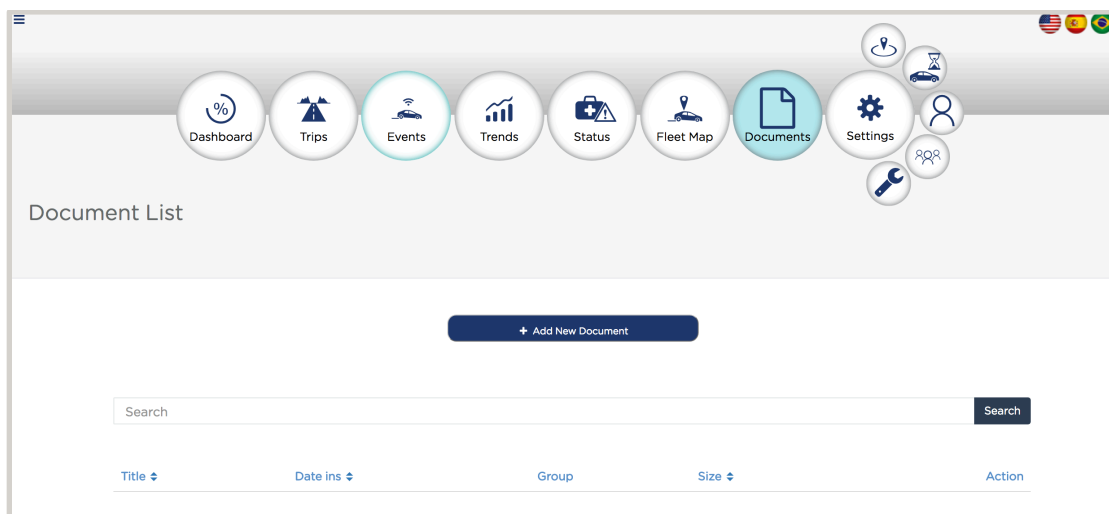
8. Documents

The documents section allows you to add and save documents pertinent to the fleet. Documents may include receipts for gas, maintenance, tolls, estimates for repair, vehicle photos, or other documents of interest.

Clicking the 'add new document' button allows you to upload and title the document selected. Clicking save uploads the document and makes it available to users.

9. Settings

9.1 Geofence

This feature allows you to draw a circular area around a specified location. When a vehicle crosses into a created geofence, a warning will be triggered to you or operator via email or Twitter.

The geofence will be applied on all vehicles of a fleet group.

This feature is available for the Fleet Manager and Team Lead profiles.

If you are an admin or supervisor, a geofence link will appear around the Settings menu:
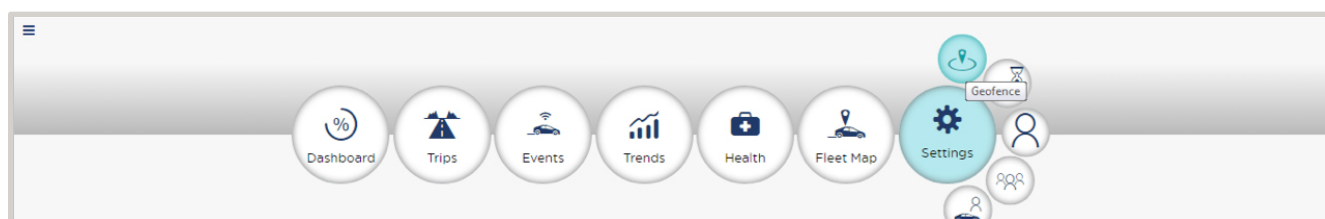
The page will ask you to select one of the fleet groups, as seen below:
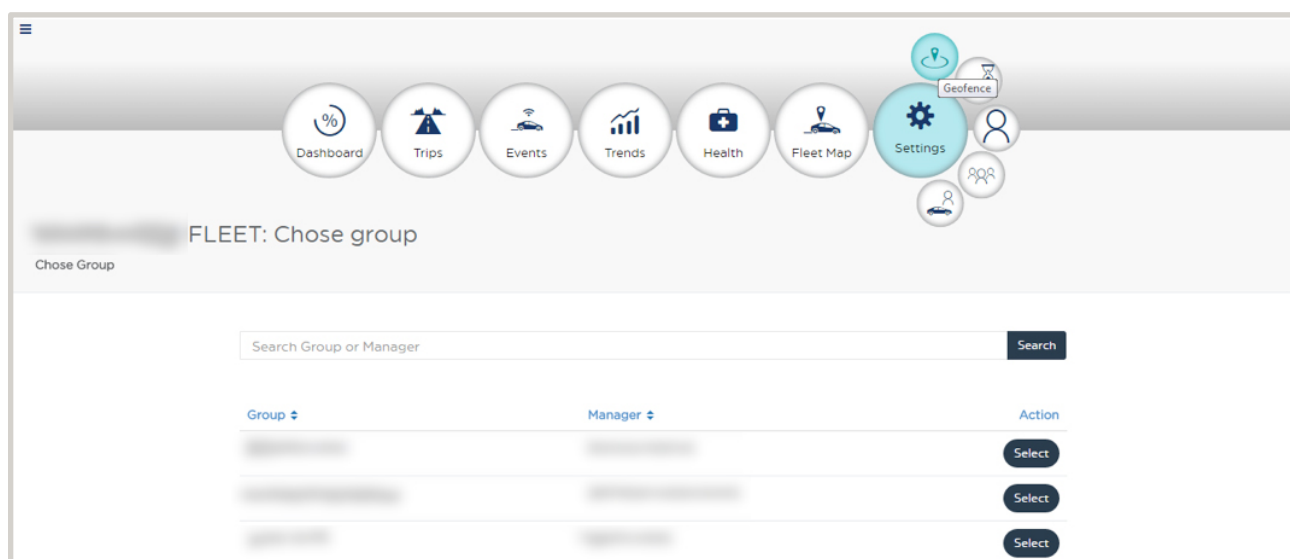
After selecting a group, you'll see the figure below. Note: If you're a Team Leadr, you'll skip the previous page and only see this one:
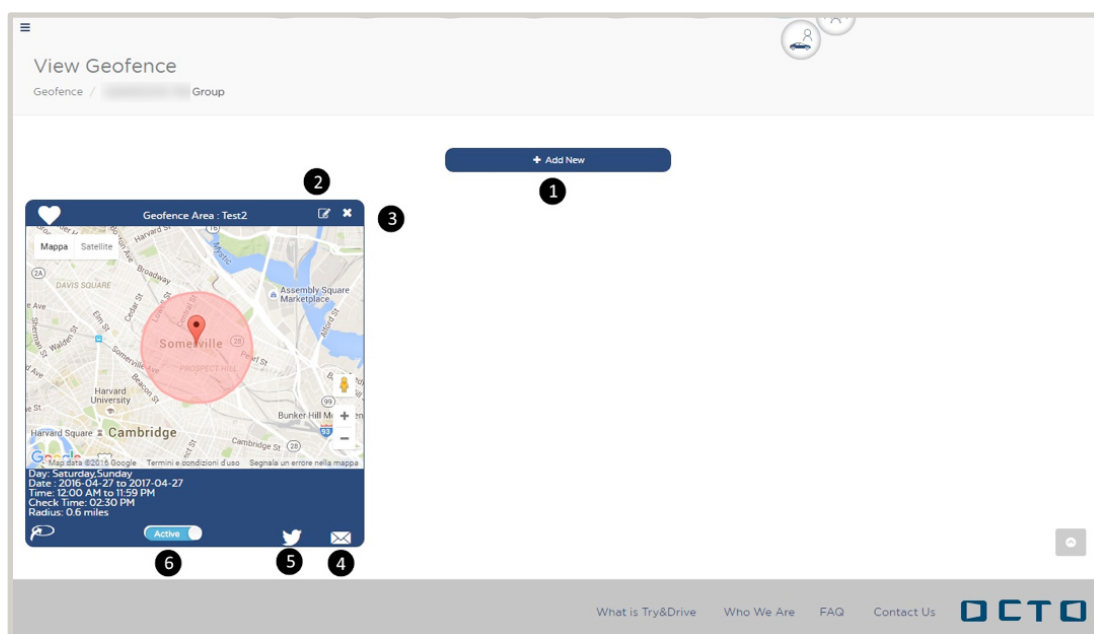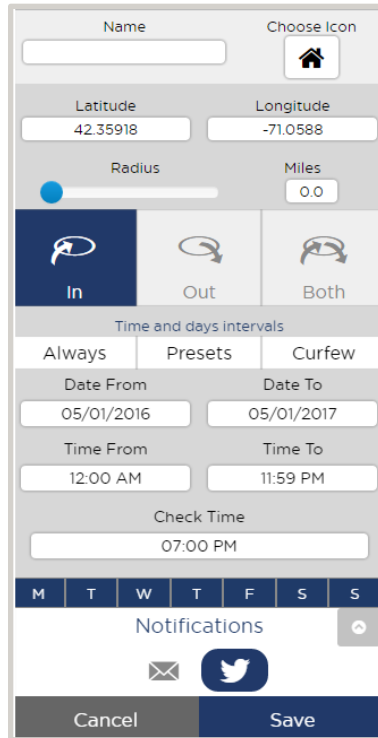
1. Add New Geofence
2. Update
3. Close
4. Notification by email
5. Notification by Twitter
6. Active – Disable

You can add a new geofence by clicking on the "Add New" button:
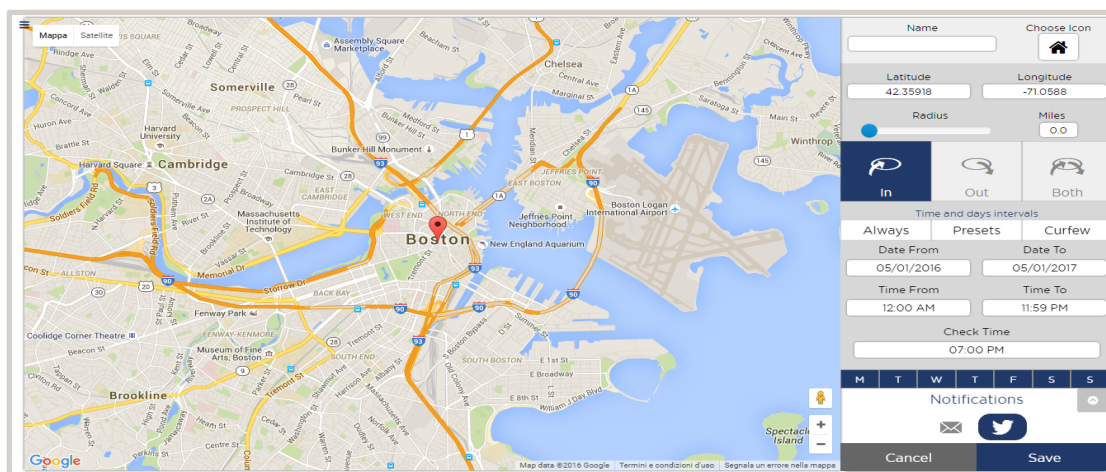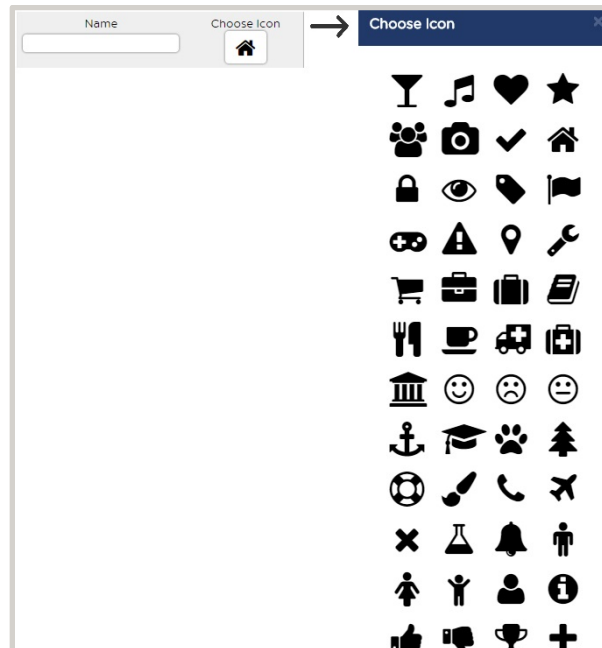
The form on the right side allows you to enter data:

Insert the name and choose the icon that is preferred:

The latitude and longitude can be set in this window. The choice of radius and miles allows you to limit a control area. The "in," "out," or "both" options indicate at which point you want to receive notifications when a vehicle crosses into the designated red area.
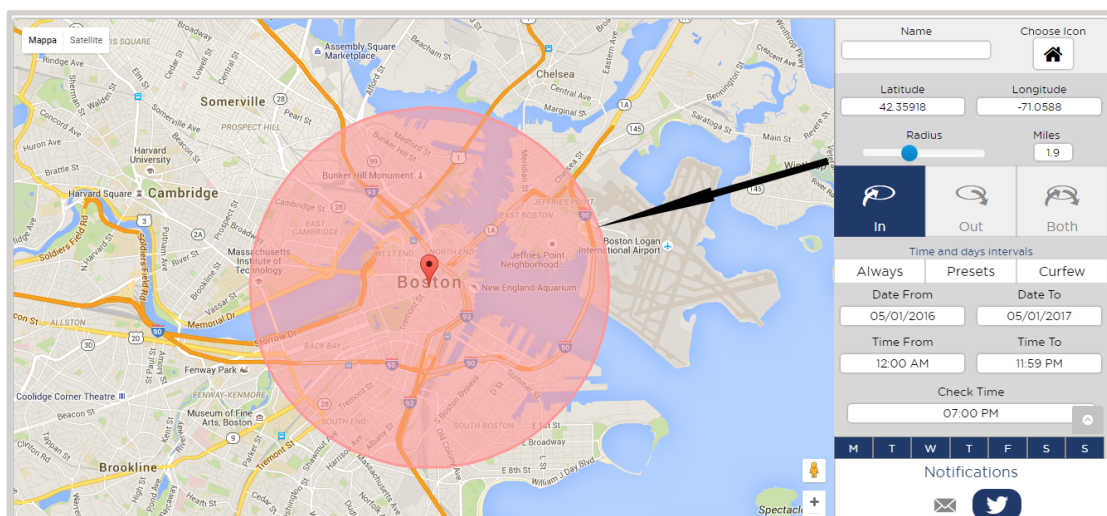
You can set a customized interval or use one of the preset intervals:
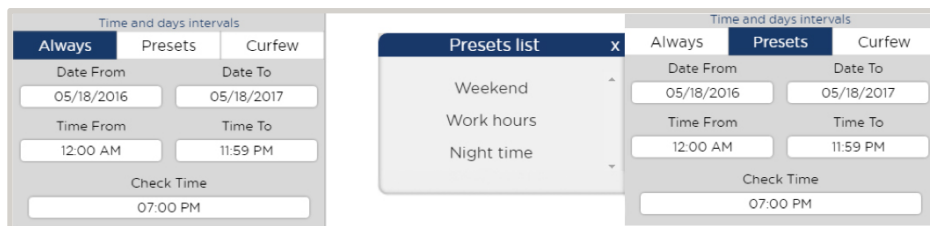
Select the day(s) of the week here:
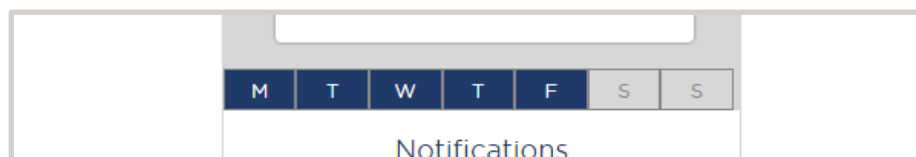
You may also select whether to send the notification by email, Twitter, other sending options or all three. Choose Save when done.

9.2 Curfew

This feature allows users to define a curfew interval, a time range where driving would cause a notification to be sent.

When the curfew is violated, a warning will be triggered to you or operator via email or Twitter.
The curfew will be applied to all vehicles of a fleet group.

This feature is available for the Admin, Supervisor and Manager profiles.

If you're an admin or supervisor, click on the curfew link around the Settings menu:
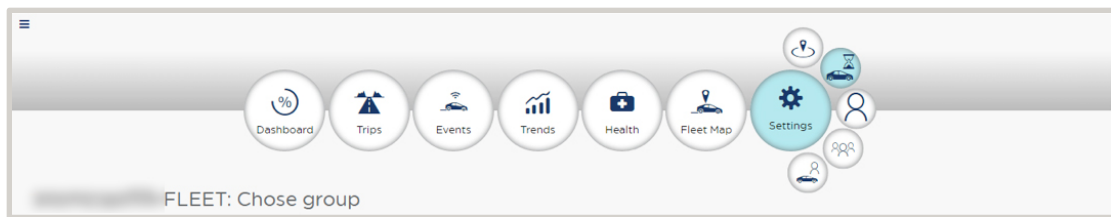
You'll see a page to select one of the fleet groups, as seen below:
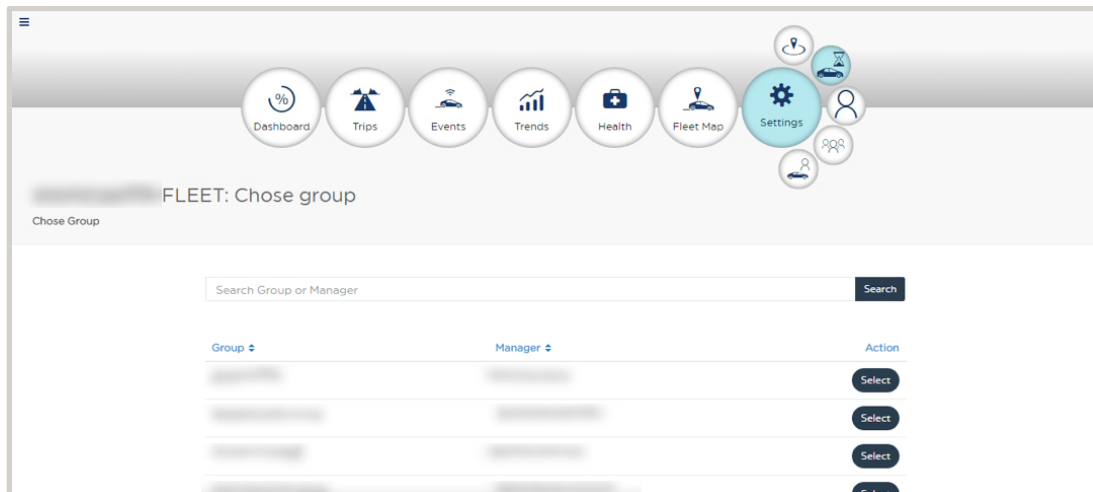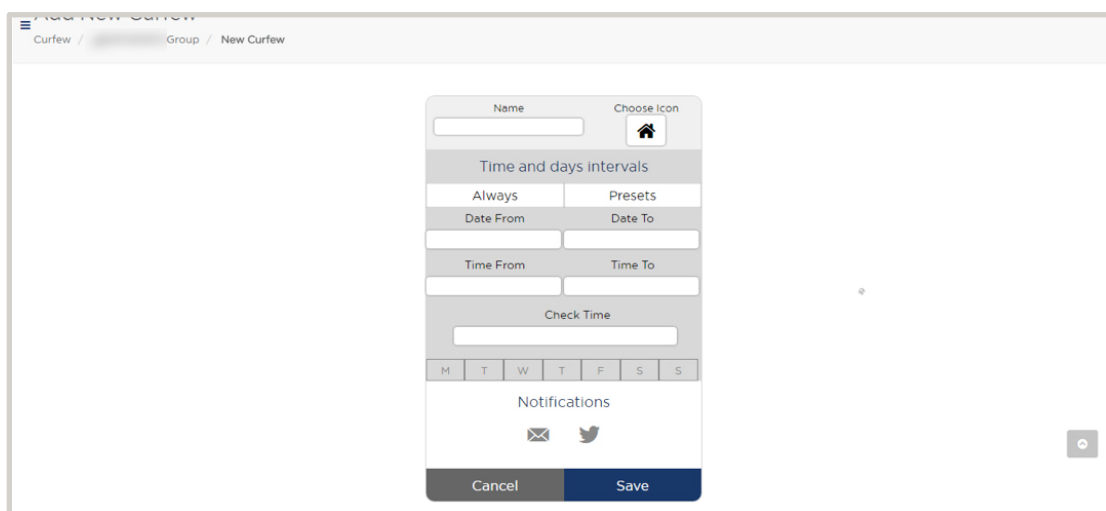
After selecting a group, you'll see a screen resembling the image below. If you're a manager, you'll skip the previous page and receive only the following one:
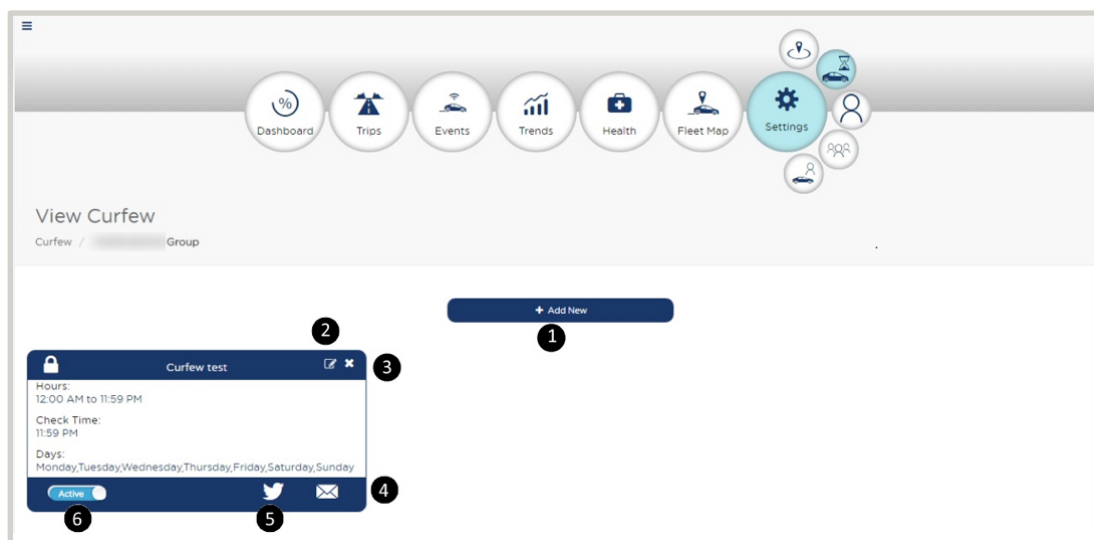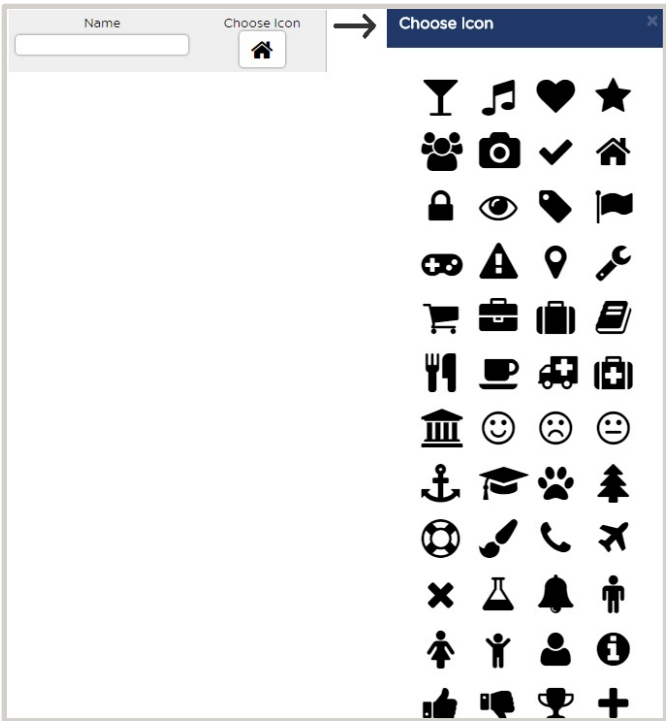
1. Add New Curfew
2. Update
3. Close
4. Notification by email
5. Notification by Twitter
6. Active – Disabled
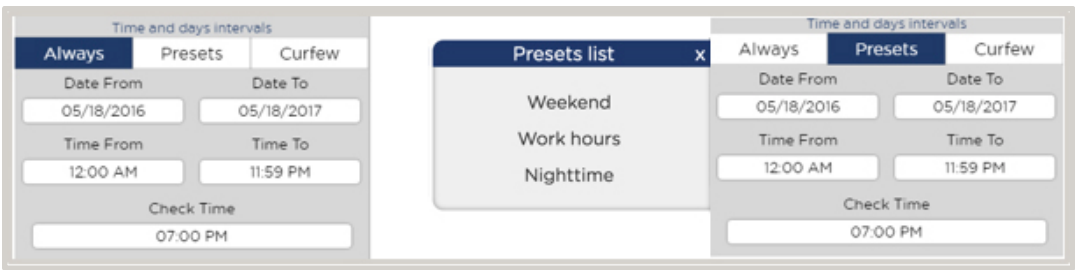
By clicking on the "Add New" option, you can add a new curfew:
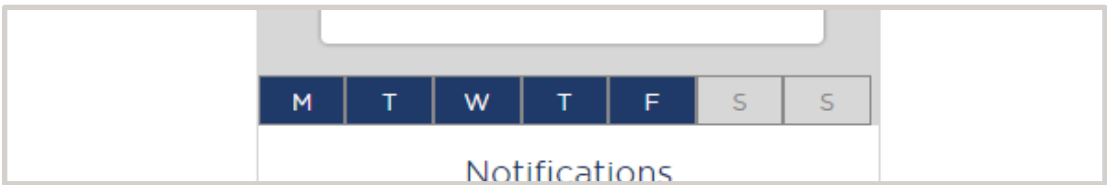
You can type the desired name and choose the icon that is preferred:

You can then set a custom interval or use one of the preset intervals.

You may select the day(s) of the week here:

Finally, you're able to select how to send the notification, whether by email, Twitter, other sending options or all three. Save the notification when finished.
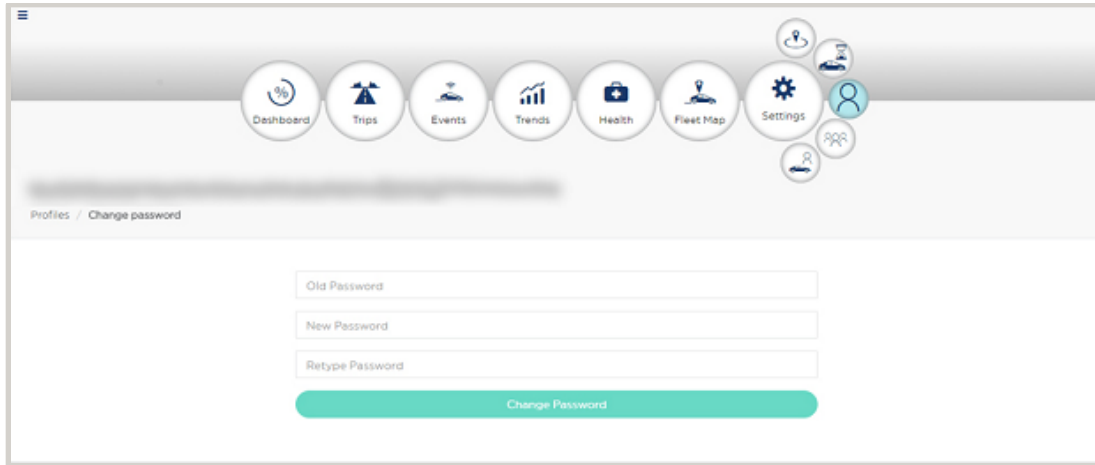
9.3 Profiles

You can manage the changing of passwords or change the personal information/vehicle photo for yourself or someone who reports to you.
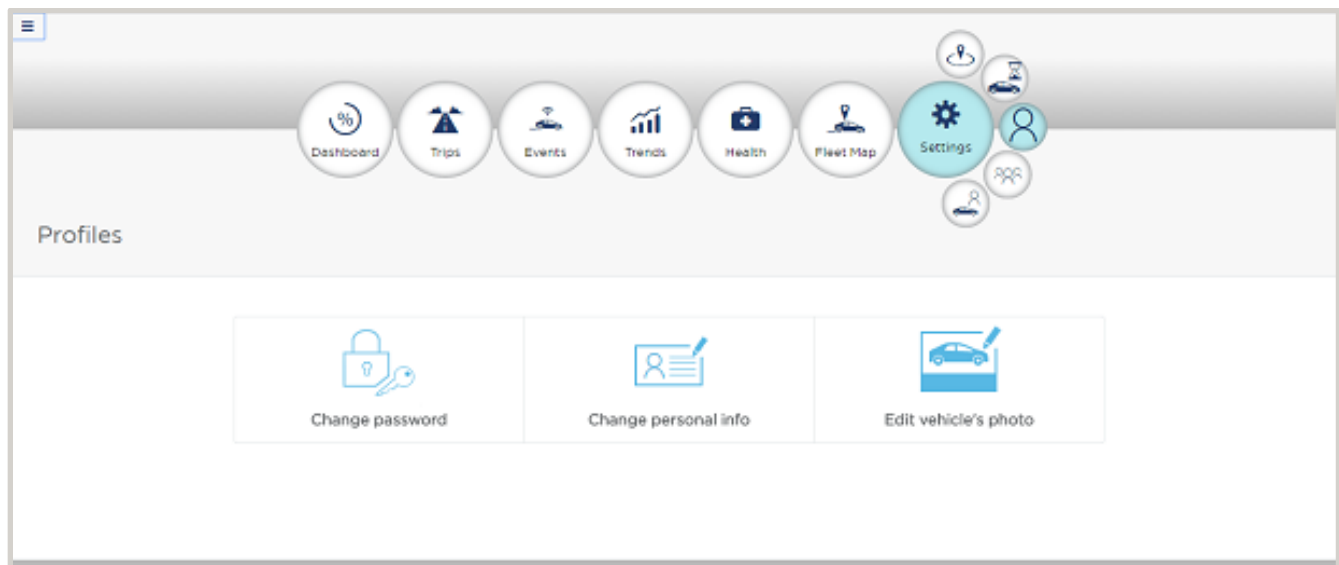
9.3.1 Change password
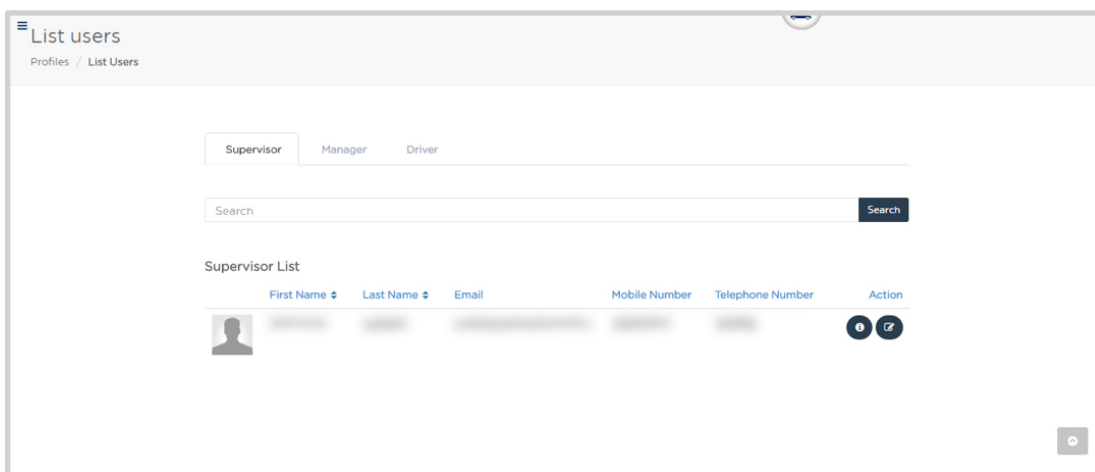
9.3.2 Change personal info

This section allows you to change personal info about yourself or the people who report to you.
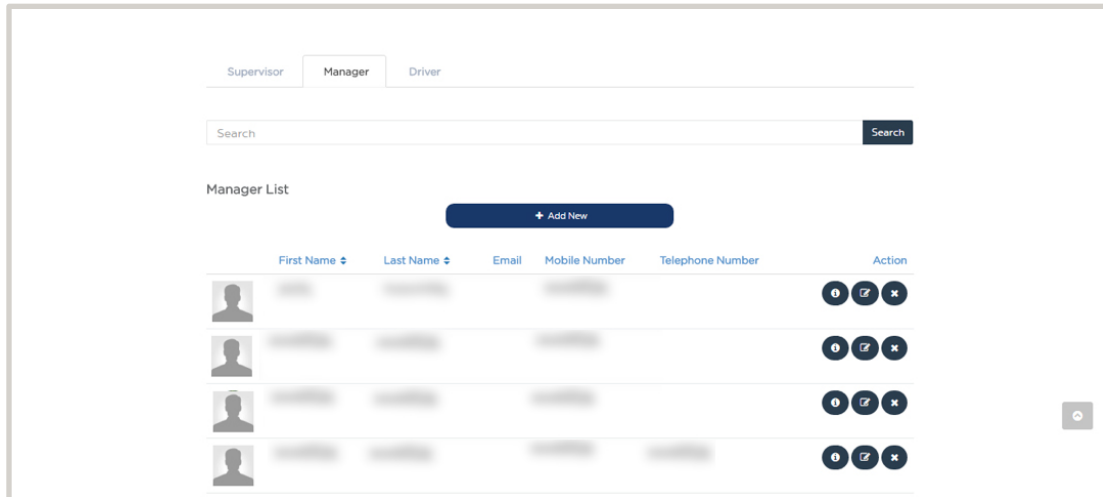
A new user can be created for each profile proposed in the tab view.

In the figure below, for example, a supervisor can change or view his/her personal info as well as info for all the managers and all drivers assigned to his/her group(s).

You can also add a new manager or driver, as explained later in this document.
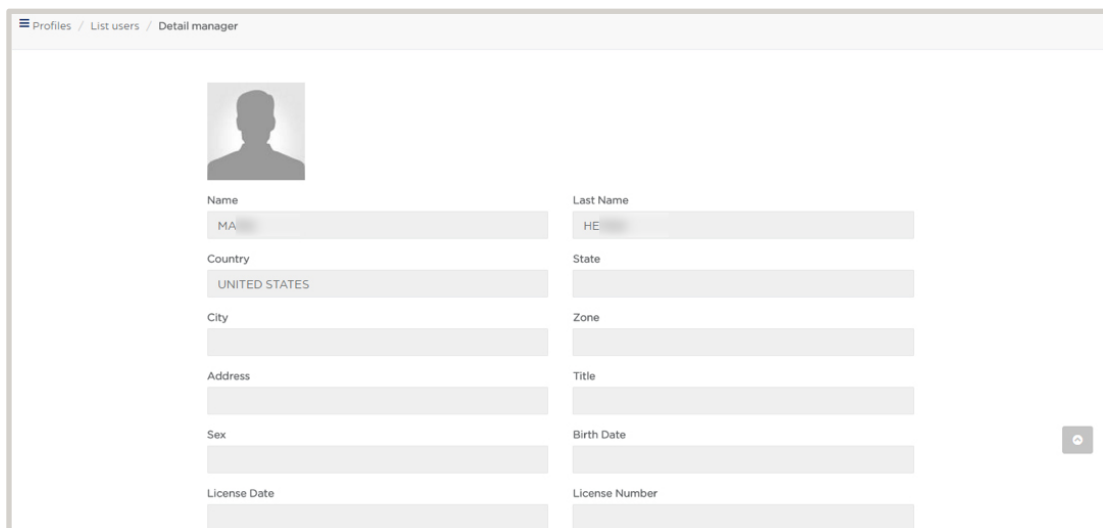
Changing the tab will show a list for the different profiles:
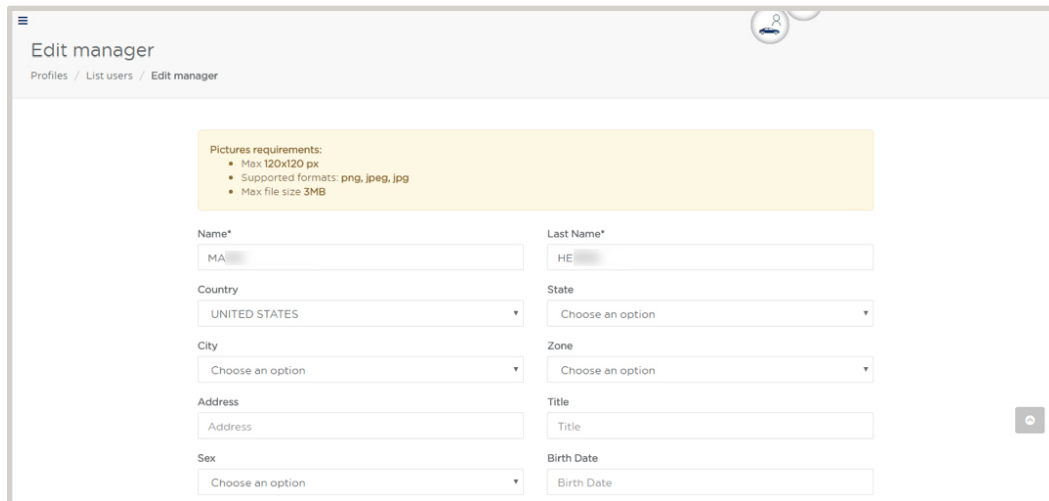
Through the following buttons, , you can view additional details, edit personal info and delete a user. Note: the "Delete" button is not present for your own profile.

If you click on details, this screen will appear:

If you click on "Edit," you'll see:
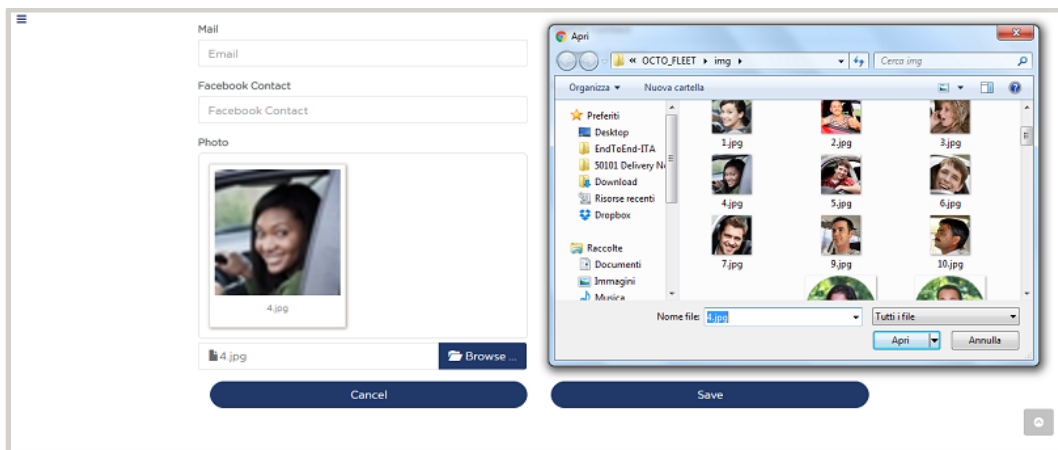
You can fill in the fields, add a photo and then save the changes by clicking the "Save" button.
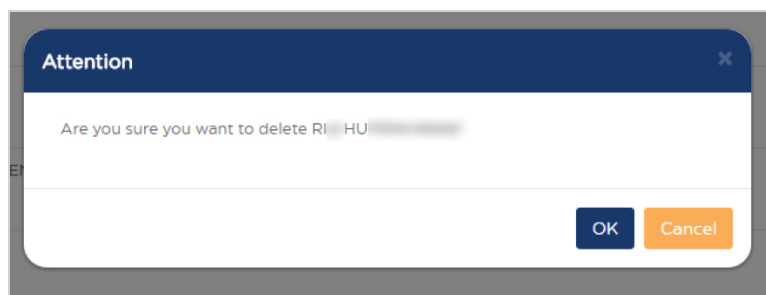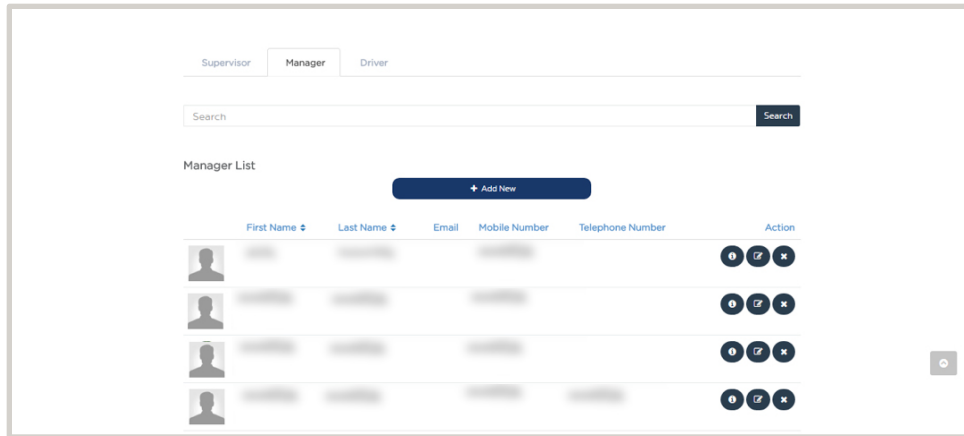
If you click on "Delete" after confirmation, The user will be deleted:
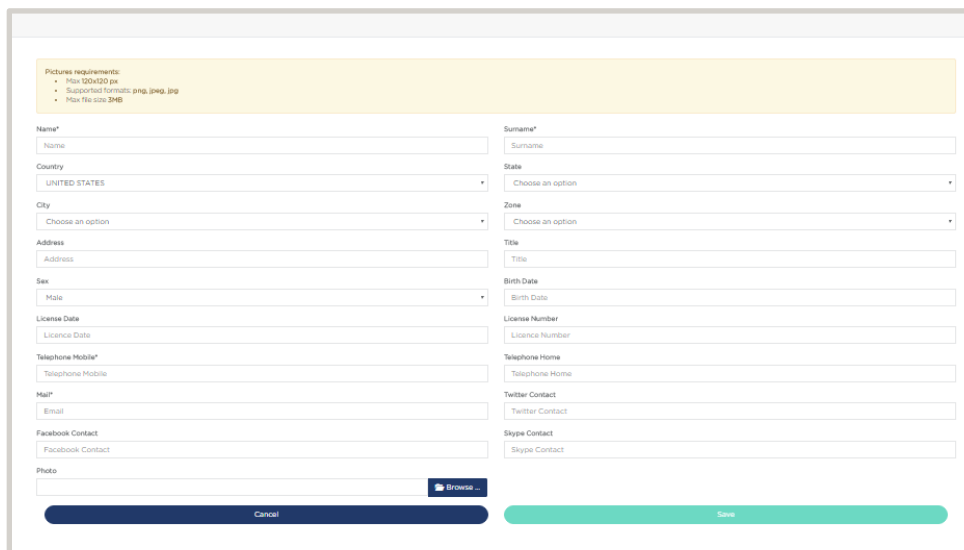
Using the "Add New" button, you can add a new user in the proper profile.

To create a new user, fill in all the fields or just the required ones in the following form and use the "Save"button. An email with a username and password will be sent to the email address used in the below form:

9.3.3 Edit vehicle's photo

This section allows users to change the photo of their vehicles, as well as all the vehicles they manage or supervise.

When you click on "Edit vehicle's photo," there will appear a list of vehicles for which you can change the photo:
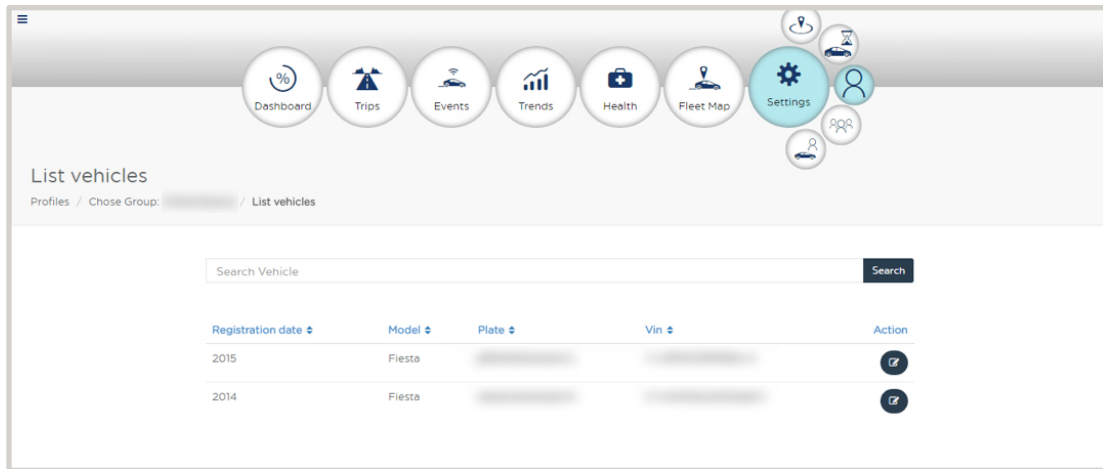
You can then make changes using the "Edit" button:
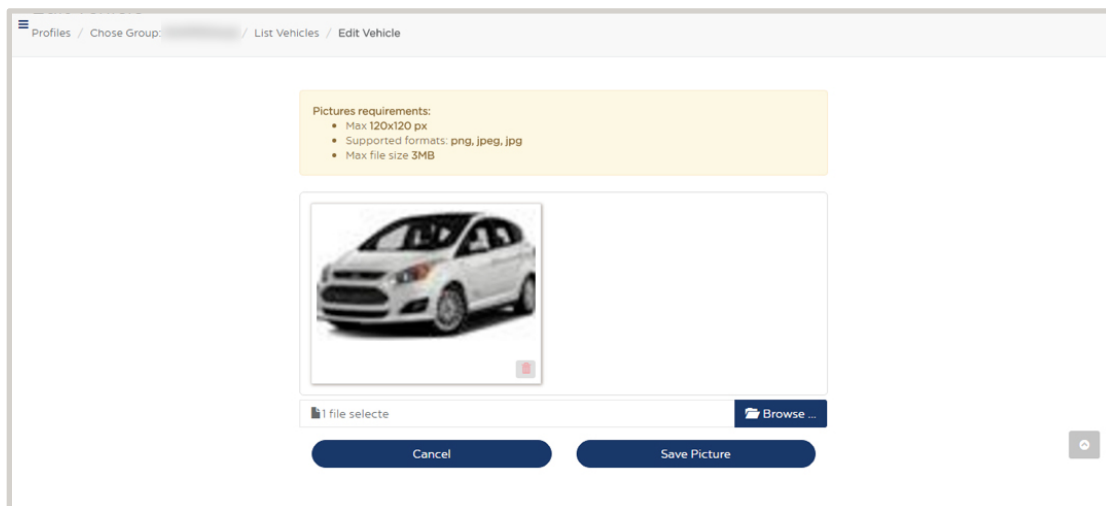
9.4 Manage Group

This section is available only for the Supervisor profile.

A fleet can be divided into different groups. Every group has a set of vehicles, drivers and an assigned manager.
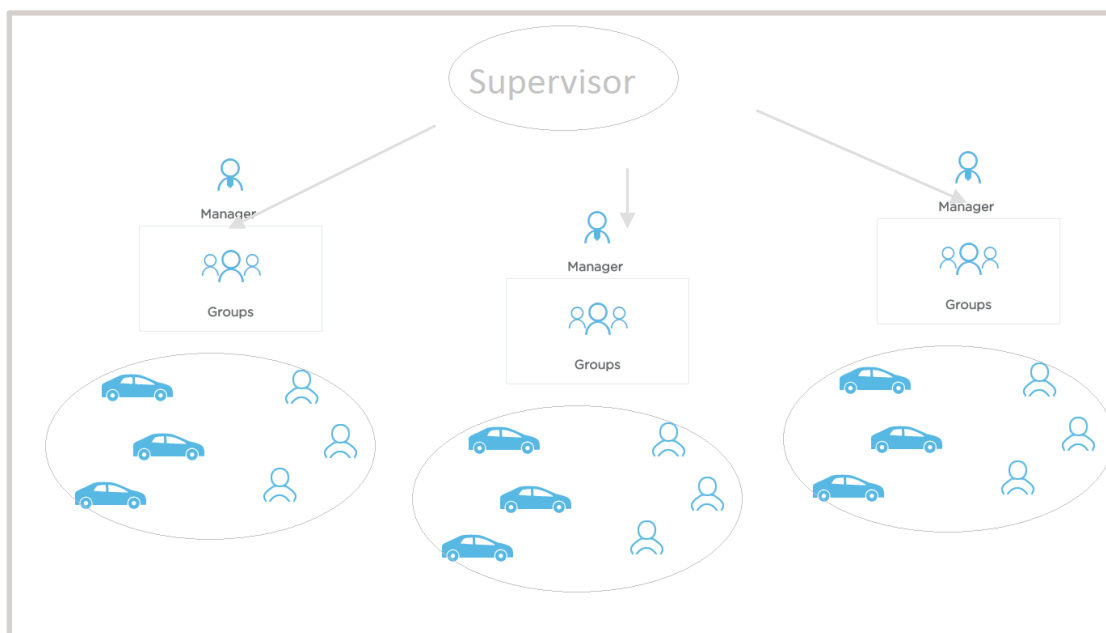
To view this option, click on the "Manage Group" button of the Settings menu:
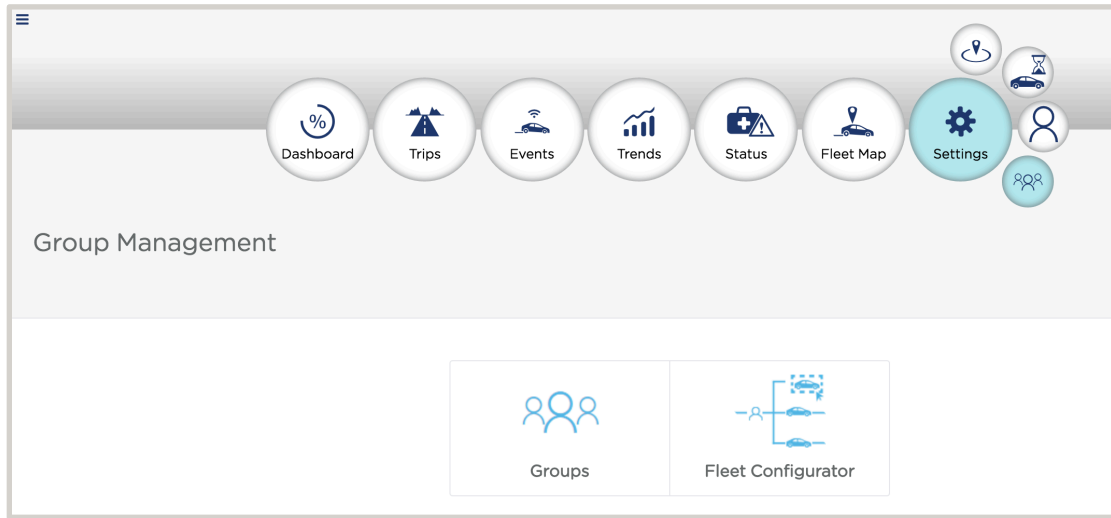
You can:

- Create, modify or delete a group
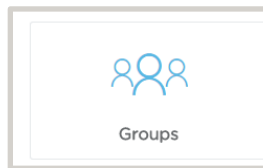
- Assign a vehicle, a driver, a group and a manager with a user-friendly drag-and-drop feature
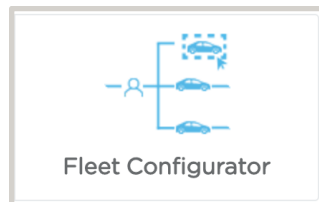
9.4.1 Groups

By clicking on the below image,
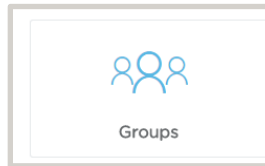
you'll be shown a list of existing groups:
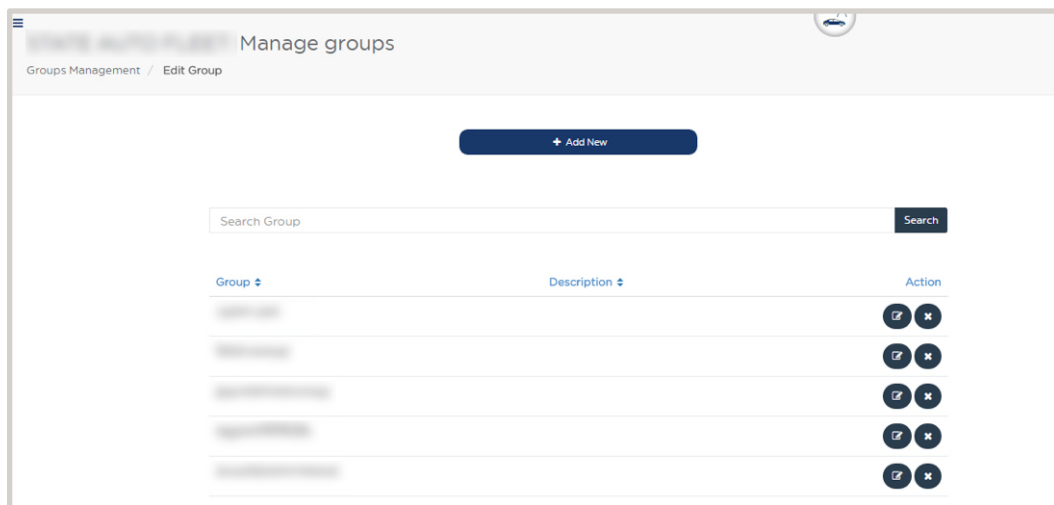
Through these buttons: , you can edit details and delete a group or add a new group, using .
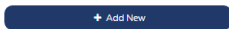
Edit a group
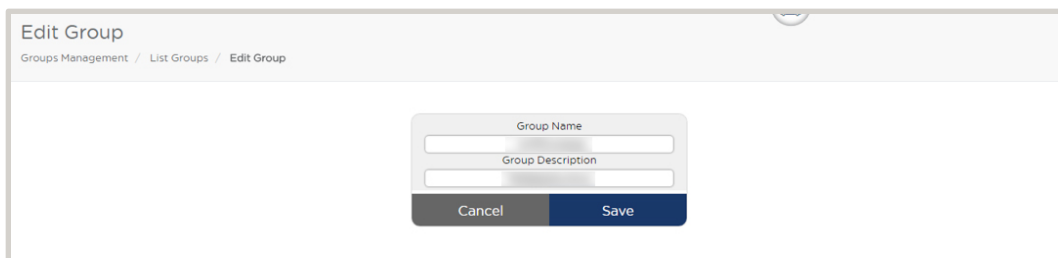
You can edit the name and the description for an existing group and use the "Save" button to save the changes.

Delete a group
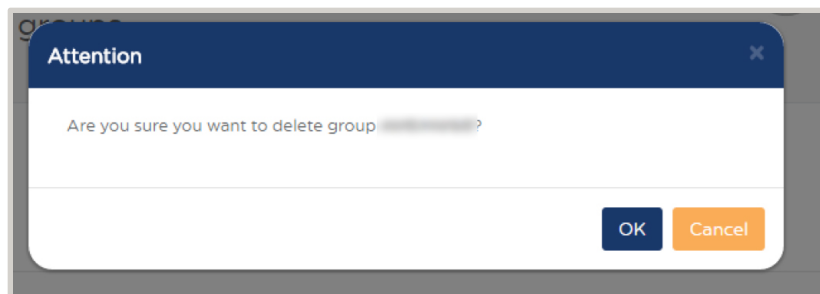
If you click on "Delete" after receiving confirmation, the group will be deleted.

Add a group
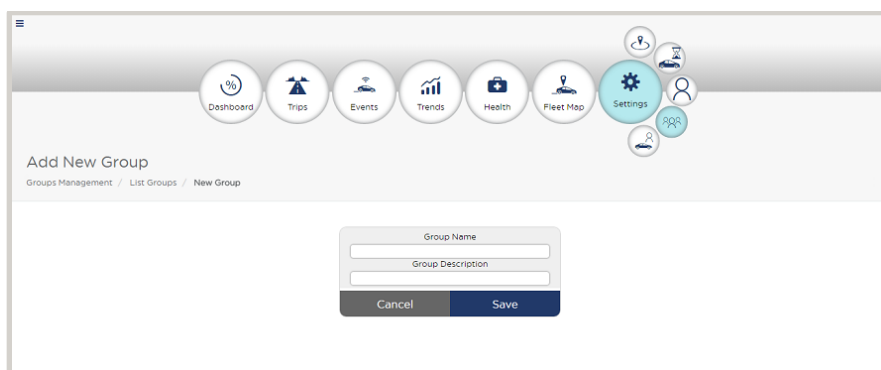
You can fill in the name and the description field for a new group and use the "Save" button to insert the information.

9.4.2 Assign Vehicle, Driver, Manager and Group

This section is available only for Manager and Supervisor profiles.

In this section, a supervisor or manager can assign a driver to a vehicle. Additionally, a Fleet Manager can assign a Team Lead to a group and manage drivers and vehicles.

Due to the dynamic environment of fleet management, there is a graphical drag-and-drop feature to update group, manager and vehicle/driver assignments.

To change vehicle/driver assignments, click on the "Manage Group" icon shown below in settings:
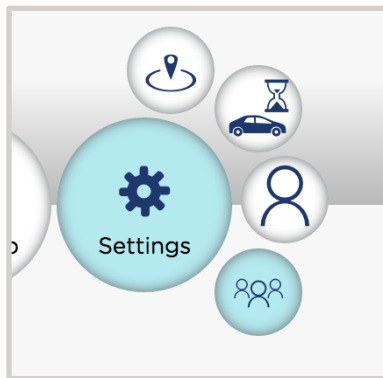
To open the hierarchy graphical display, click on the "Fleet Configurator" icon:
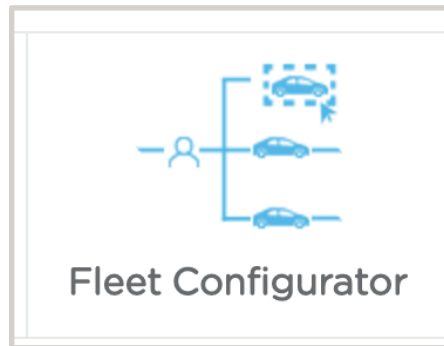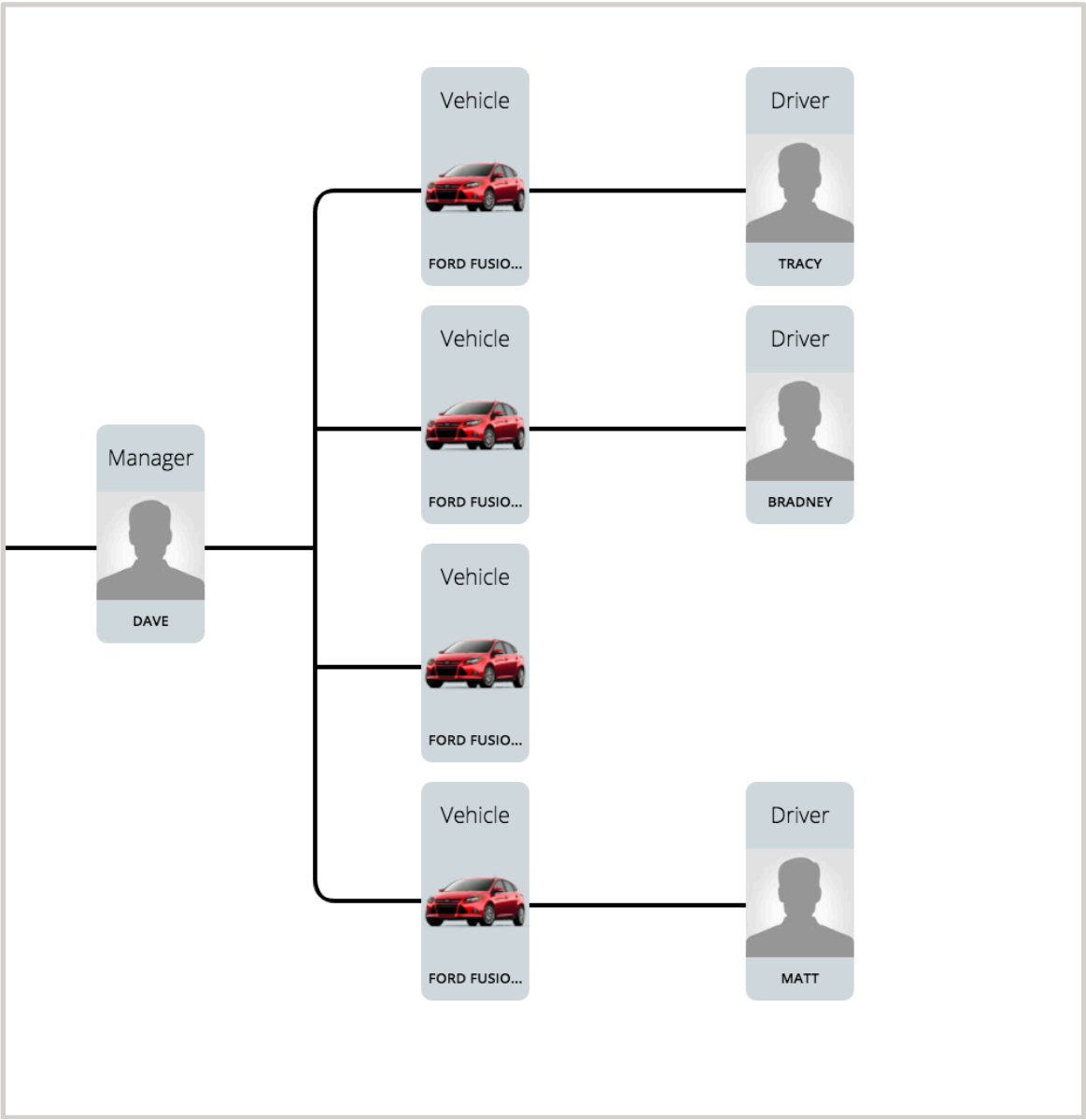
Drag and drop the drivers next to the proper vehicle and they'll automatically be saved.

If the desired driver is not listed on the graphical image, he/she will be listed to the right of the hierarchy. All four headings can be expanded if selected to show you what's available for each category.
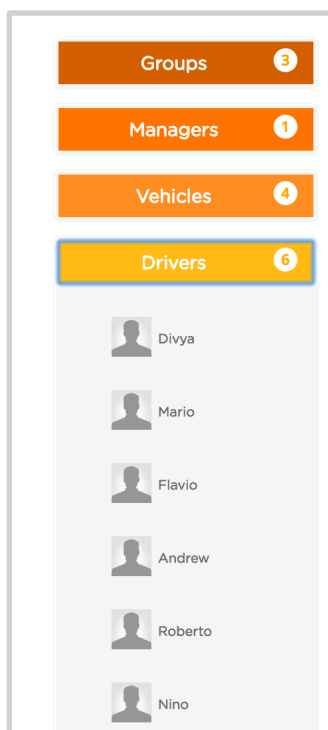
If you want to unlink a driver from a vehicle, drag and drop the vehicle to the unlinked section on the right of the screen shown above. This can be done for groups, managers, vehicles and drivers.

On the contrary, if you would like to add an unlinked group, manager, vehicle or driver, click on the header, view the item to move and then drag and drop to the appropriate area of the hierarchy.

Note: Only supervisors will be able to view and manage groups and managers (as well as drivers and vehicles). Managers will be able to manage their drivers and vehicles.

10. Service

This section allows the supervisor (fleet manager) to record, store and track information on vehicle maintenance.
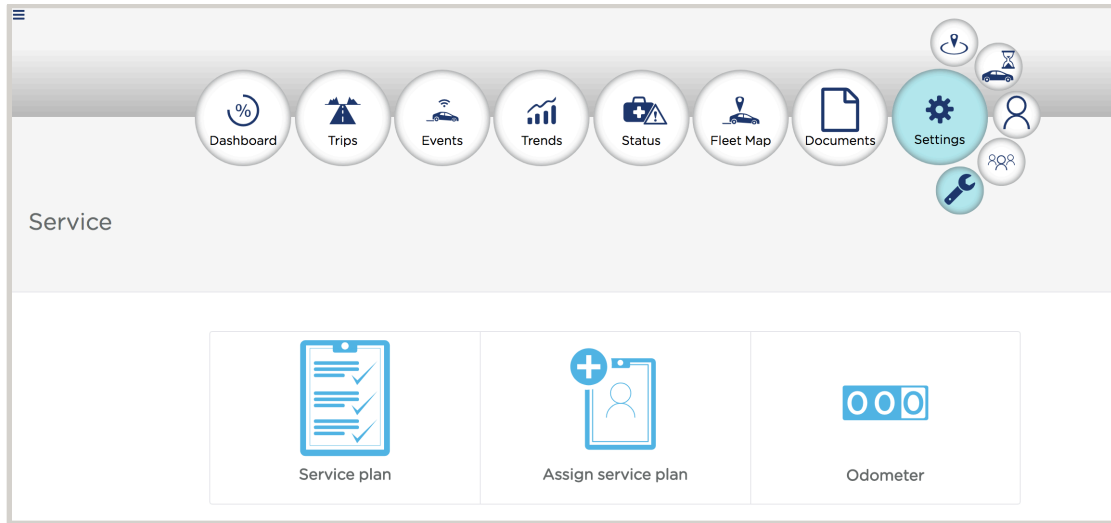
10.1.1 Service Plan

When the Service Plan icon is clicked, the groups will be shown to add, delete or modify a service plan. You must click "select" next to the desired group.
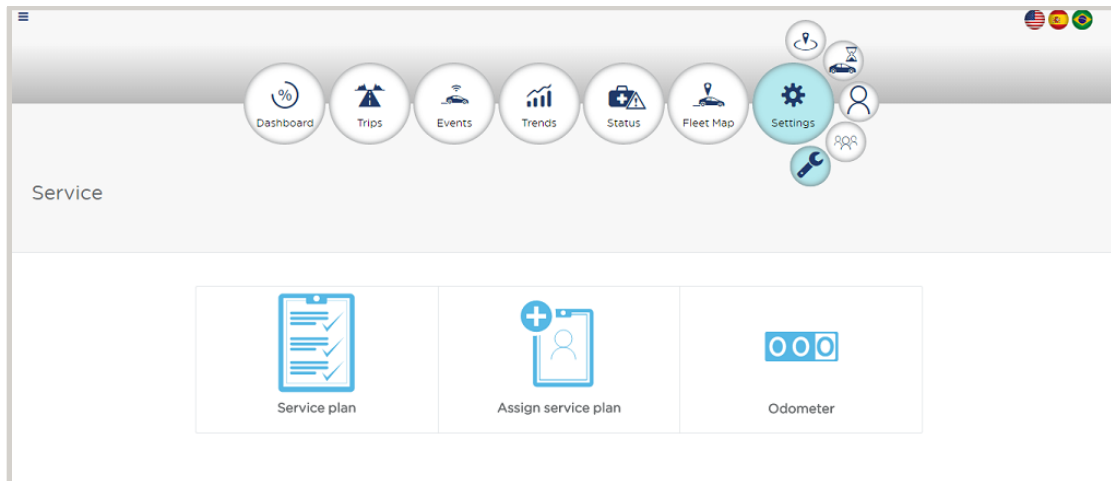
When the group is selected, the existing service plans display if applicable. You can also add a new service plan by clicking "Add New Service Plan."
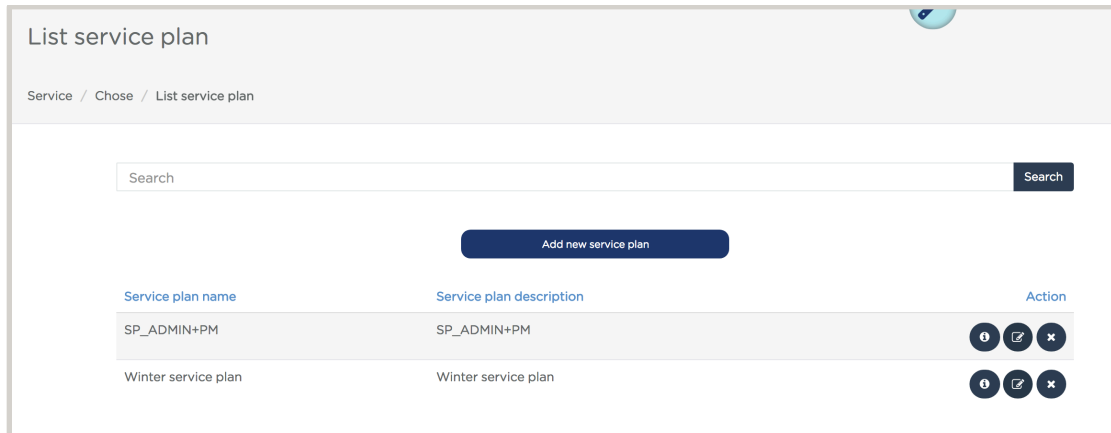
To view the details of an existing plan, click :
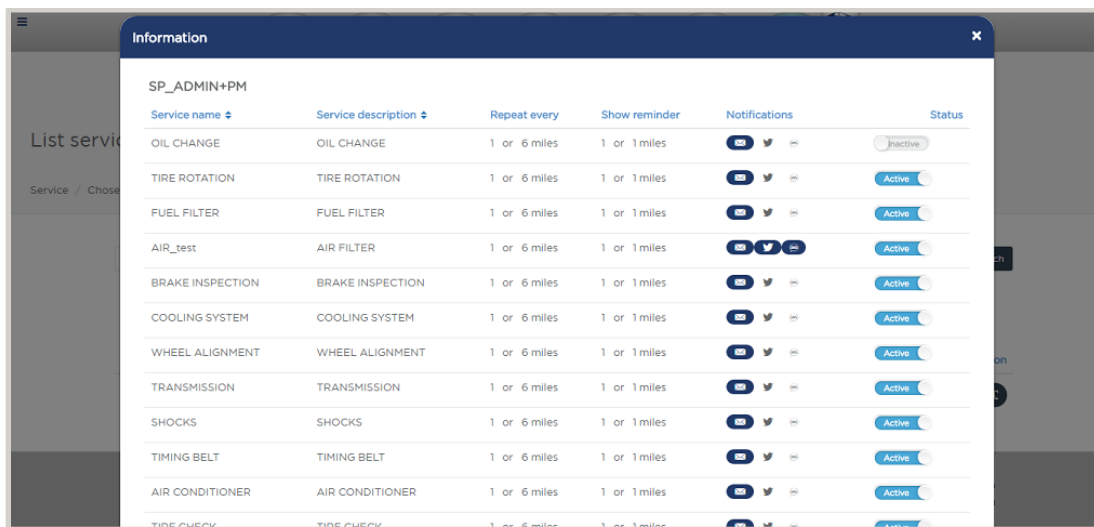
To edit a service plan, click [edit icon] :

In this section you can add a new service [Add new service]

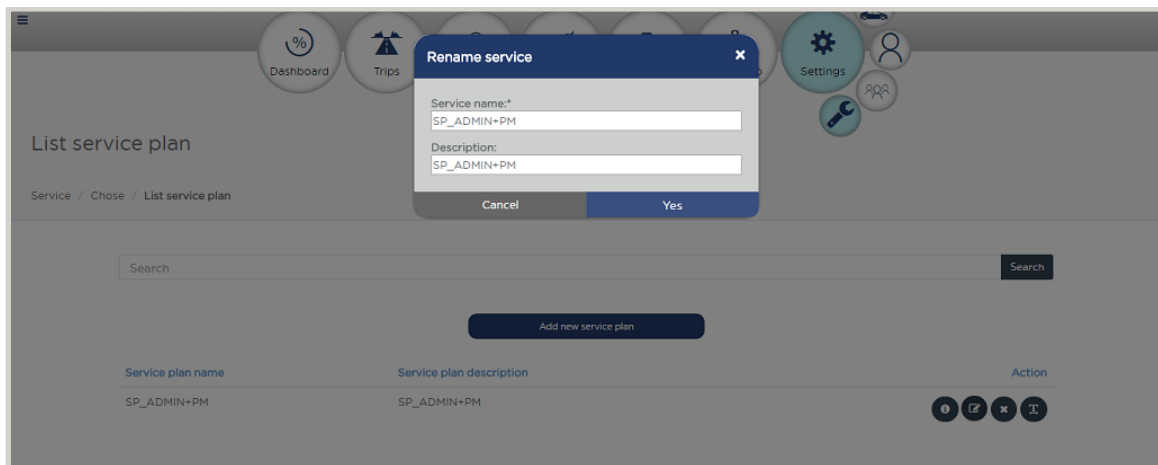You can enable/disable a service in the plan using the switch, edit or remove service:

To save changes, click on "Send" at the bottom of the screen.

Users can also rename an existing service plan.

A service plan may be deleted.
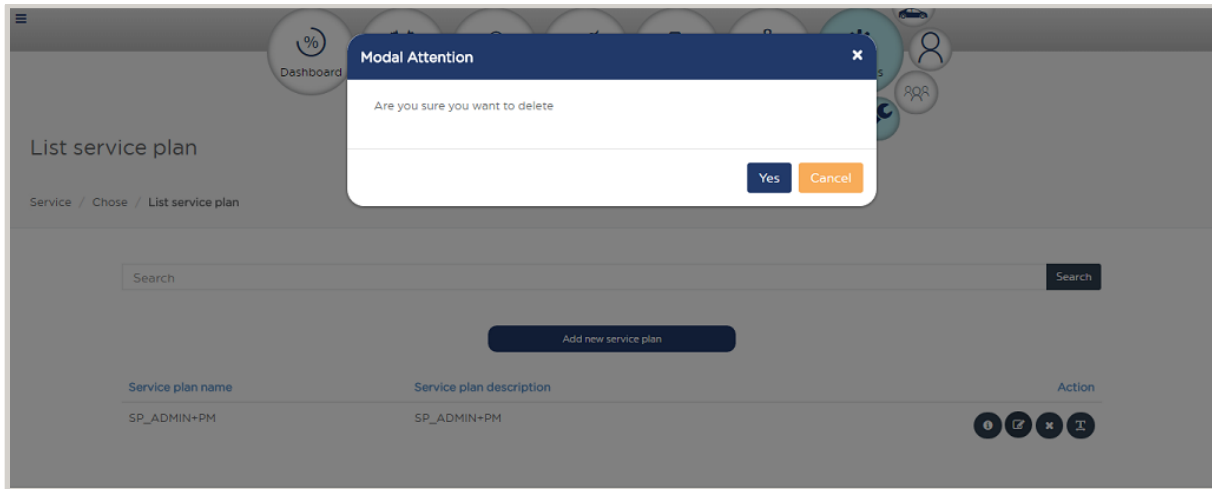
10.2.1 Assign Service Plan

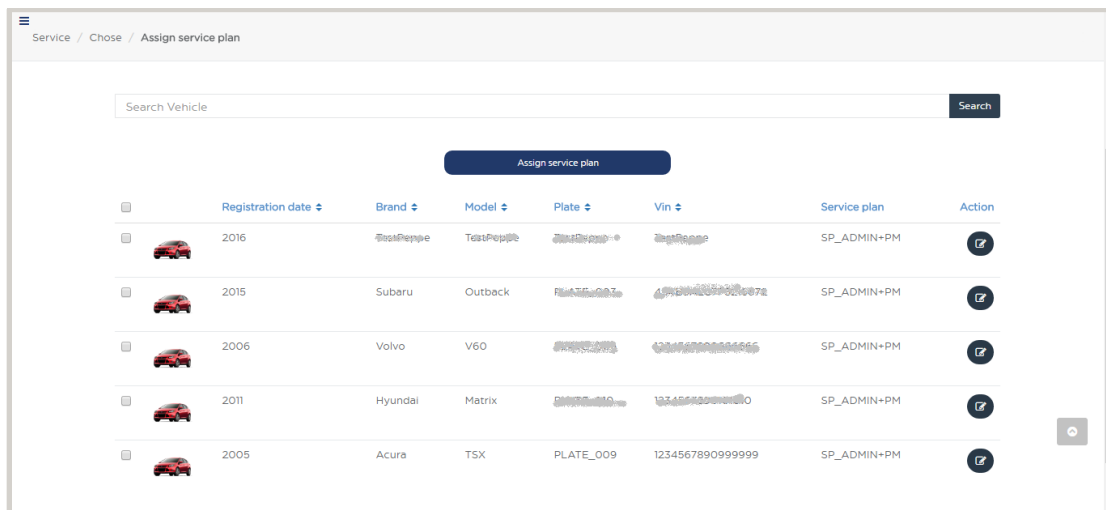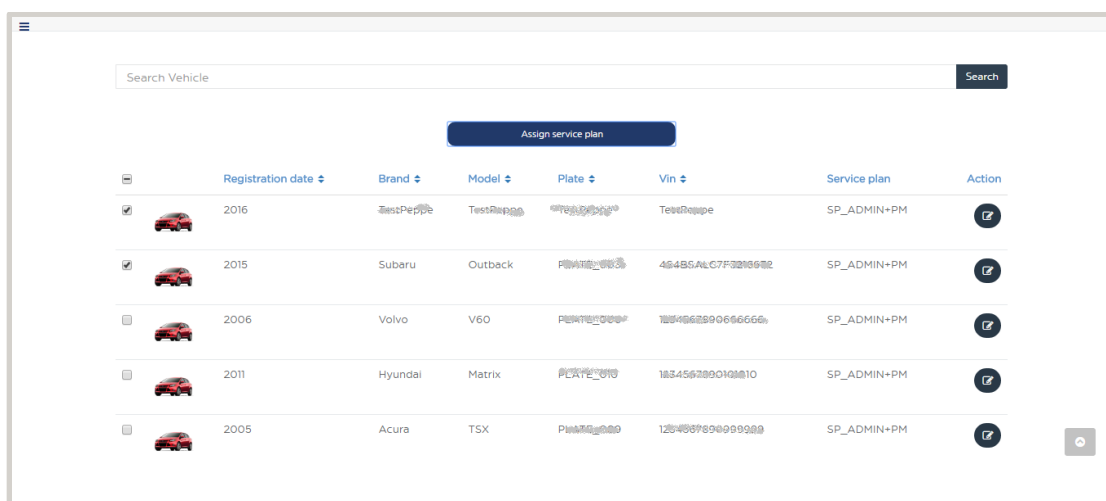The "assign service plan" button shows you the list of vehicles and their assigned service plans. The default configuration is for all vehicles to be assigned to default service plans.
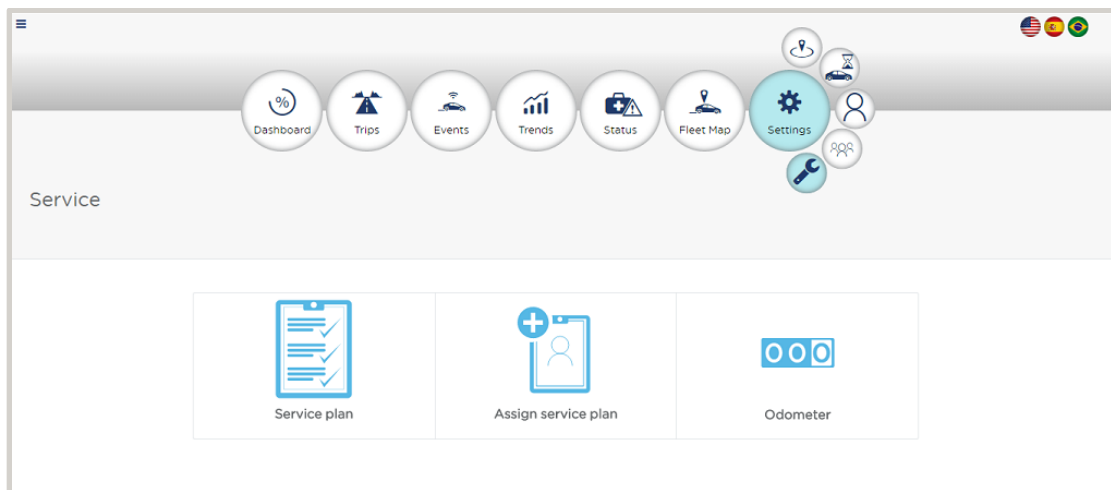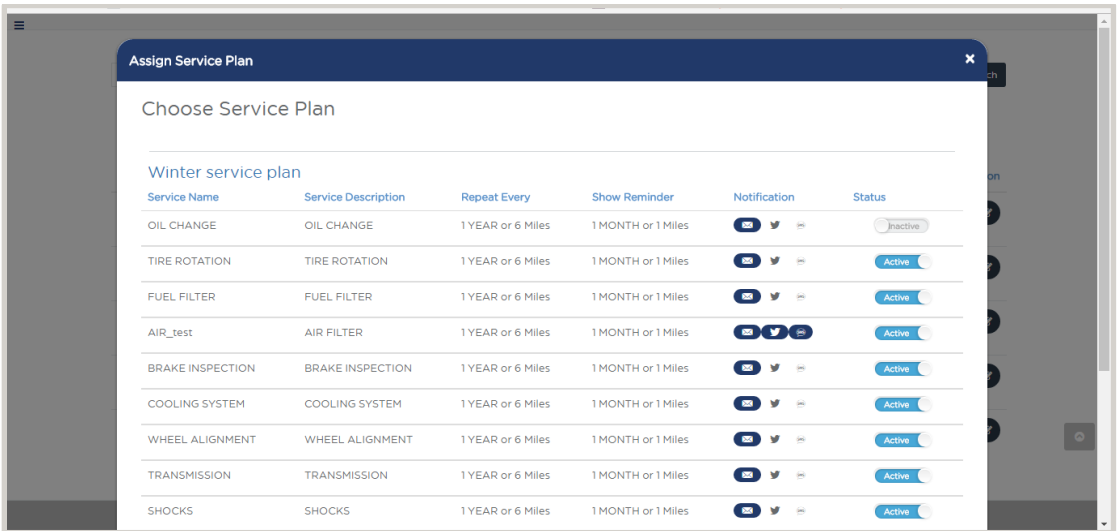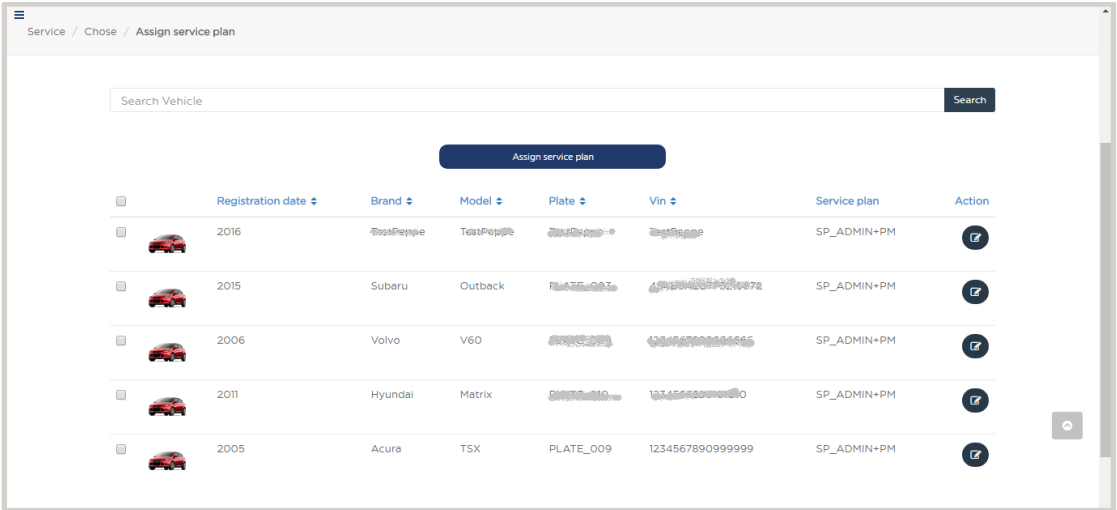
You can assign a service plan to one or more vehicles by selecting the checkmark box on the left of each vehicle then selecting "Assign Service Plan" button:

You can then choose a service plan and click the assign button:

You can also change a service configuration for a single vehicle clicking on edit button:

You can change or add a service to the plan once the edit button is selected. To save changes, click the Send button:

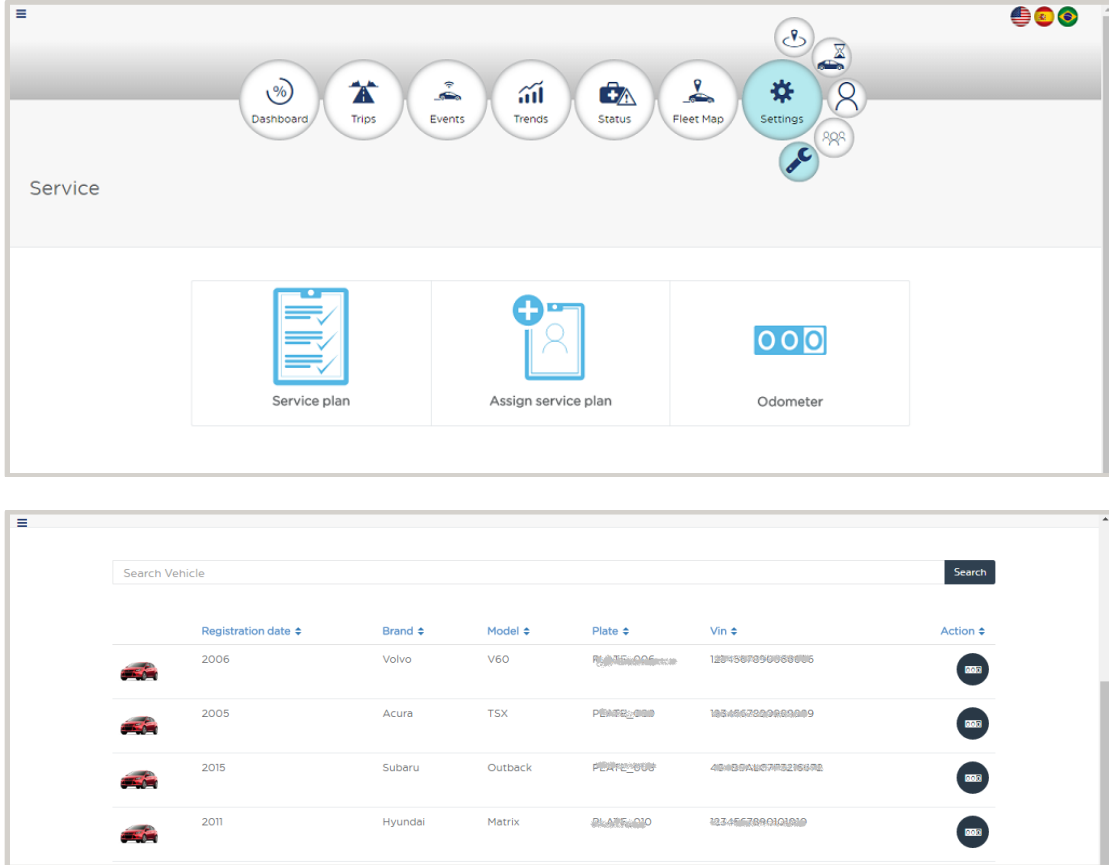Service / Chose / Assign service plan / Edit Service List

SP_ADMIN+PM

Add new service

Service name	Service description	Repeat every	Show reminder	Notifications	Status	Action
OIL CHANGE	OIL CHANGE	1 Year or 6 miles	1 Month or 1 miles	✉ 🐦	Inactive	
TIRE ROTATION	TIRE ROTATION	1 Year or 6 miles	1 Month or 1 miles	✉ 🐦	Active	
FUEL FILTER	FUEL FILTER	1 Year or 6 miles	1 Month or 1 miles	✉ 🐦	Active	
AIR_test	AIR FILTER	1 Year or 6 miles	1 Month or 1 miles	✉ 🐦	Active	
BRAKE INSPECTION	BRAKE INSPECTION	1 Year or 6 miles	1 Month or 1 miles	✉ 🐦	Active	
COOLING SYSTEM	COOLING SYSTEM	1 Year or 6 miles	1 Month or 1 miles	✉ 🐦	Active	
WHEEL ALIGNMENT	WHEEL ALIGNMENT	1 Year or 6 miles	1 Month or 1 miles	✉ 🐦	Active	
TRANSMISSION	TRANSMISSION	1 Year or 6 miles	1 Month or 1 miles	✉ 🐦	Active	
SHOCKS	SHOCKS	1 Year or 6 miles	1 Month or 1 miles	✉ 🐦	Active	
TIMING BELT	TIMING BELT	1 Year or 6 miles	1 Month or 1 miles	✉ 🐦	Active	

10.3.1 Odometer

To manage the required services the proper odometer value is necessary:
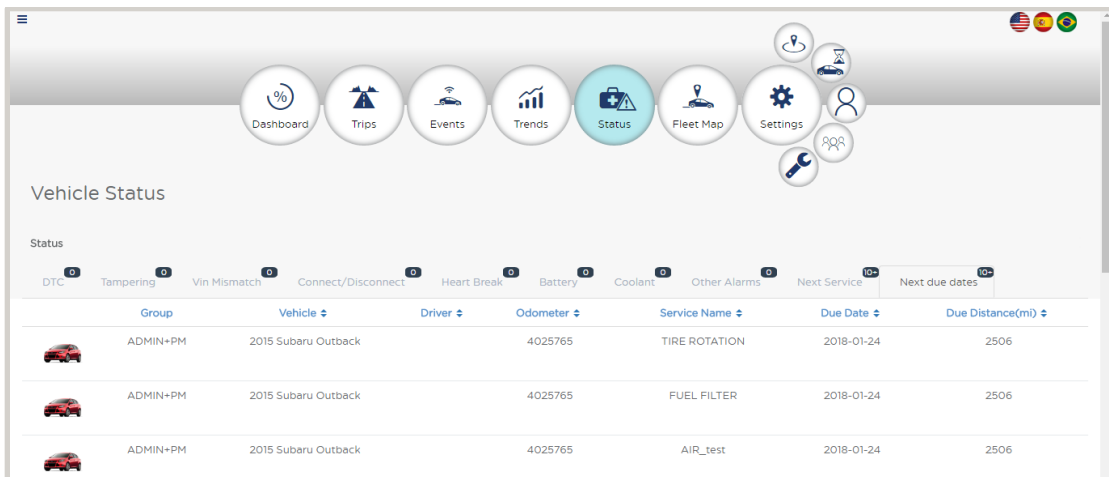
Click on odometer button:
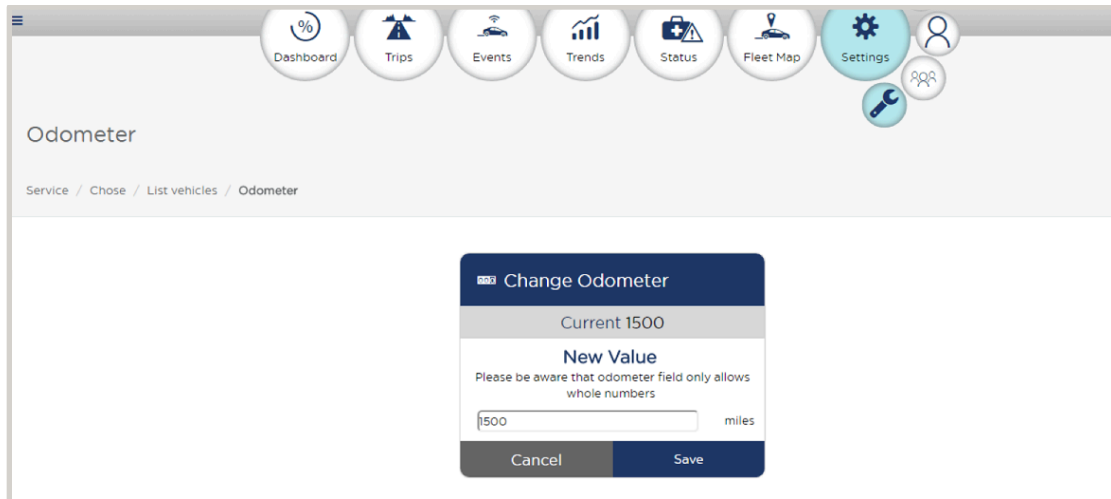
The current known value will be present; reset it with the real value and then hit Save.
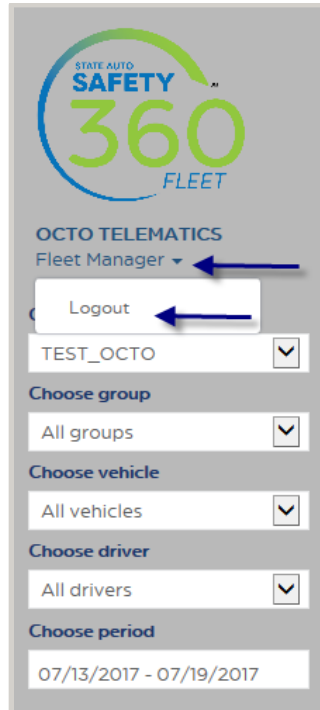
10.4.1 Next services and next due dates

From the status section you can see next services and next due dates:
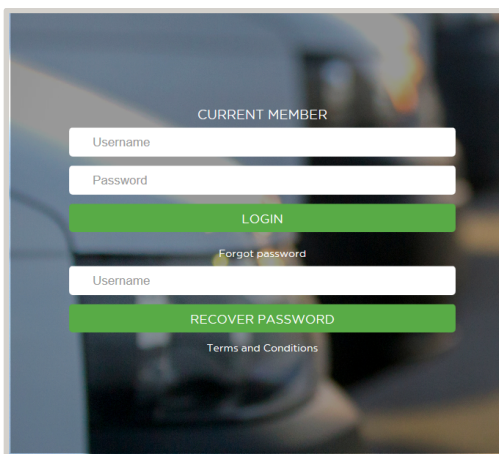
11. Logout

Click Logout to return to the login page, where it's possible to log in with another account.

12. Resend Password

By clicking "forgot password" you can request to resend the password:

We're here to help
If you have questions on the fleet dashboard, contact State Auto at 1-8 00-288-4425 or telematics@stateauto.com.