geoforce

Track and Trace User Manual

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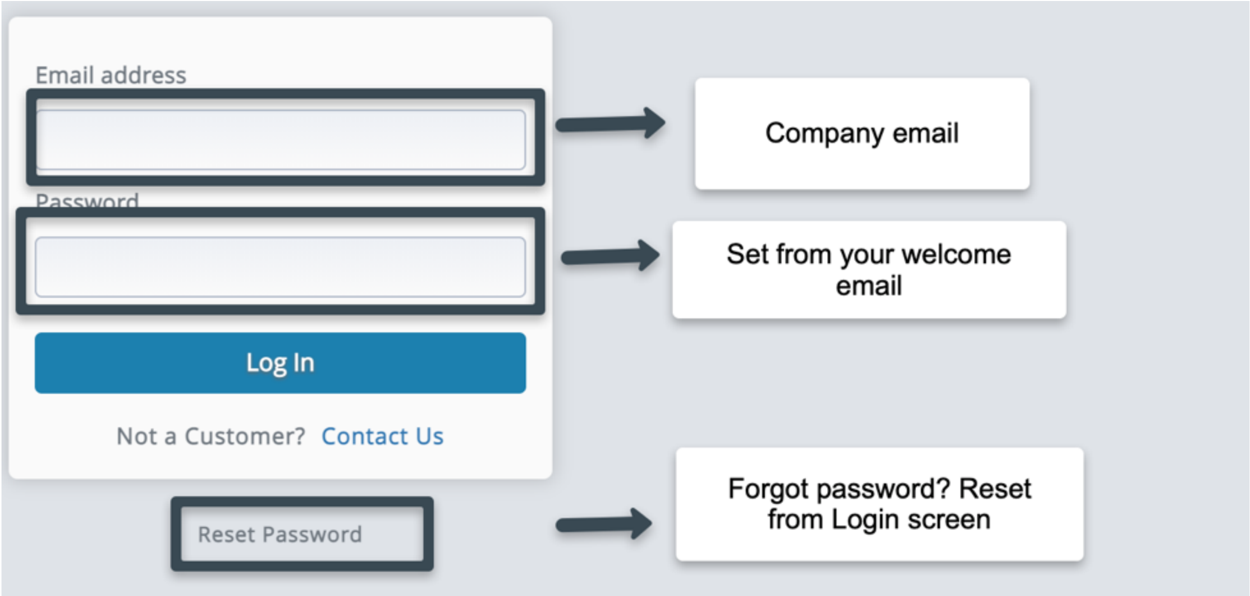
Logging In

Upon your Track and Trace user account creation, you should receive an email from app@Geoforce.com with the directions to create your password.

Log in by visiting: https://app.geoforce.com/login

Username: your company email.
Password: set via email link sent to you.

If you cannot remember your password, but know your login, you can select “Reset Password”. Can’t find your password email? Check your spam folder or reach out to the Geoforce Helpdesk: 888-574-3878 Option 2 or helpdesk@geoforce.com

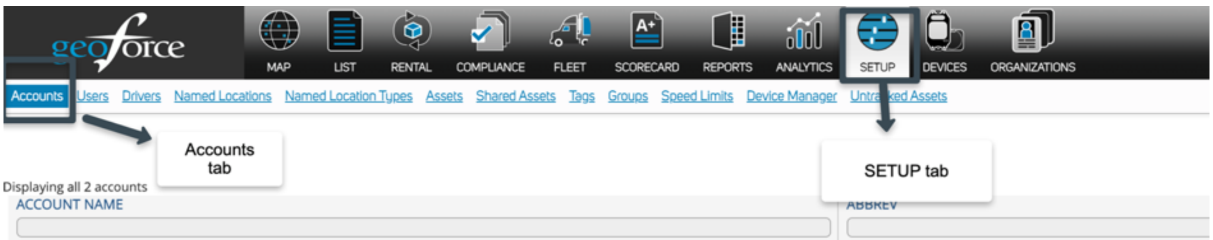


Application Setup

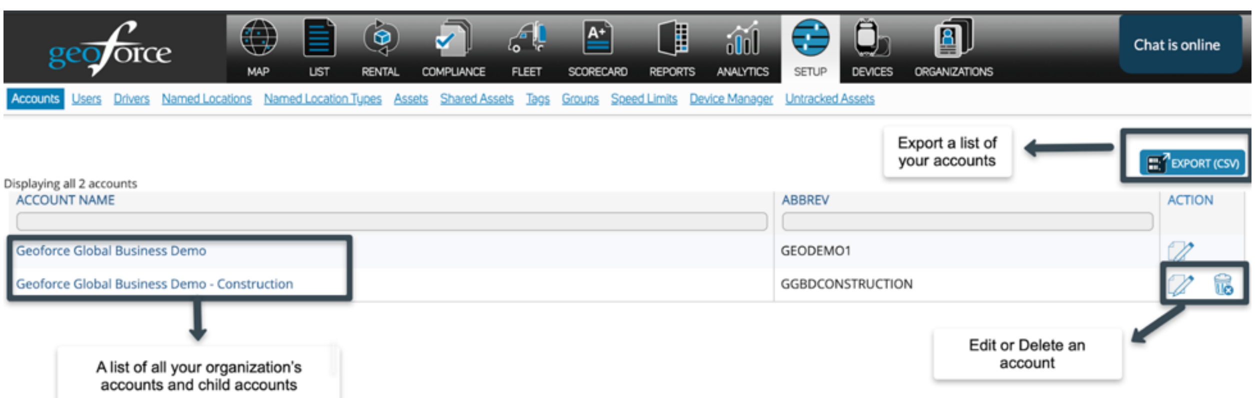
The Setup Tab allows users to add and make changes to assets, users, named locations, and more. For new companies, you will want to spend some time in the Setup tab to ensure your Tags are making it easy for you to identify them on reports and in the Map/List views.

Accounts

1. Under the Setup Tab, you will click on the Accounts button at the top left-hand side of the screen.



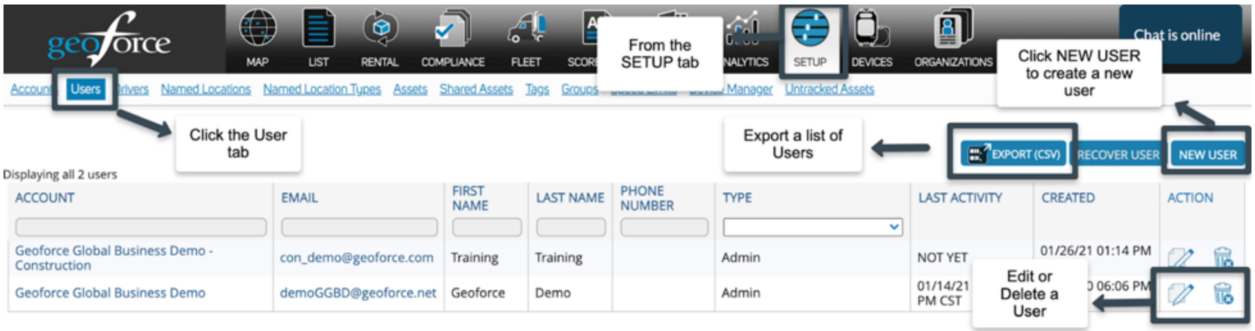
2. This screen will show you all the sub-accounts that are included under your account.



Users

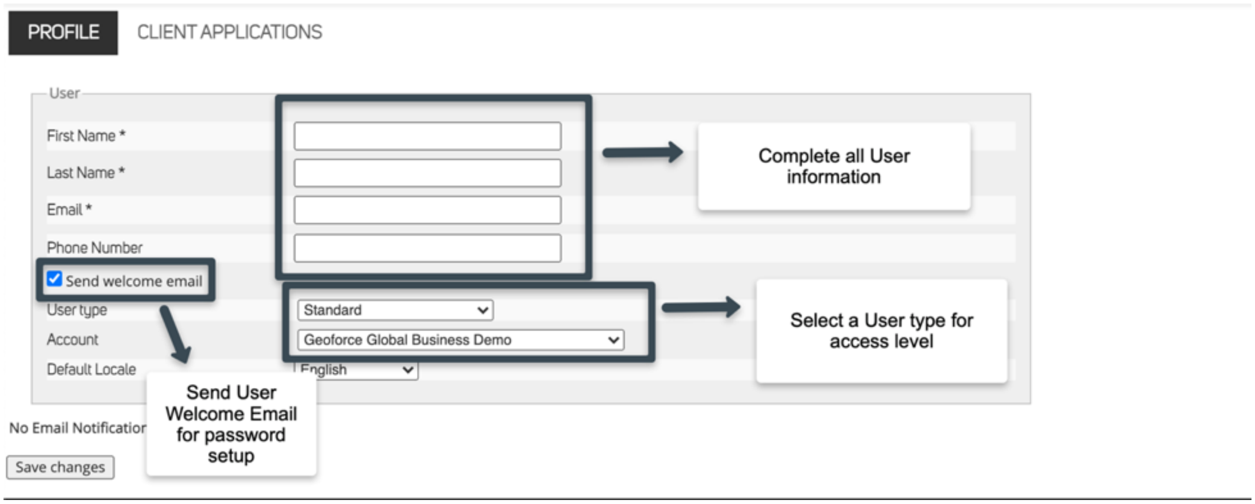
Viewing Users

1. Click the SETUP tab at the top of the screen.
2. Select “Users” from the sub-menu options.
3. View all current account users.



Creating a New User

1. Click “New User” to add a NEW USER.
2. Complete all user information and select User Type. For definitions, see User Types, below.
3. Don’t forget to save your changes by clicking the “Save changes” button.



User Types

- Admin - Can view and edit everything in account including assets, groups, locations, users, & reports. Can assign tags, create users, build named locations, set rules & run reports.
- Standard - Can view everything and create reports. Cannot edit.
- Read-Only - Can view everything on the map but cannot edit. Cannot create reports.
- Admin/Inspector - Can view and update some elements of account, assets, groups, locations, users and reports.
- Maintenance - Can inspect assets and edit maintenance tasks and run reports. Cannot view tags on the map.
- Inspector - Special Use for Mobile Field Tool Only. Read only with exception of editing and inspecting assets.

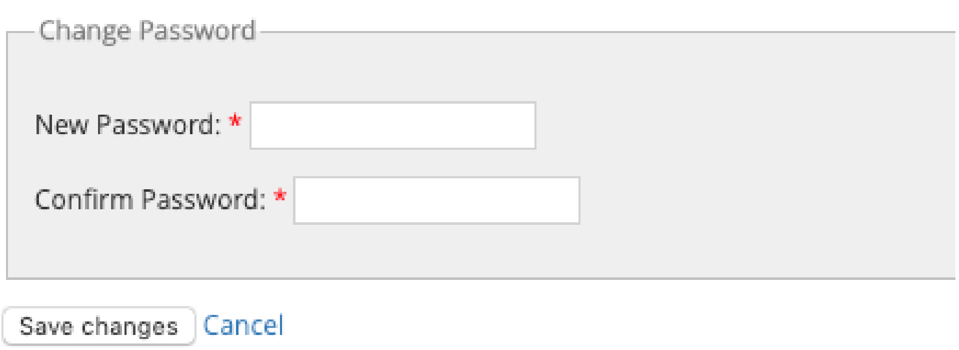
User Passwords

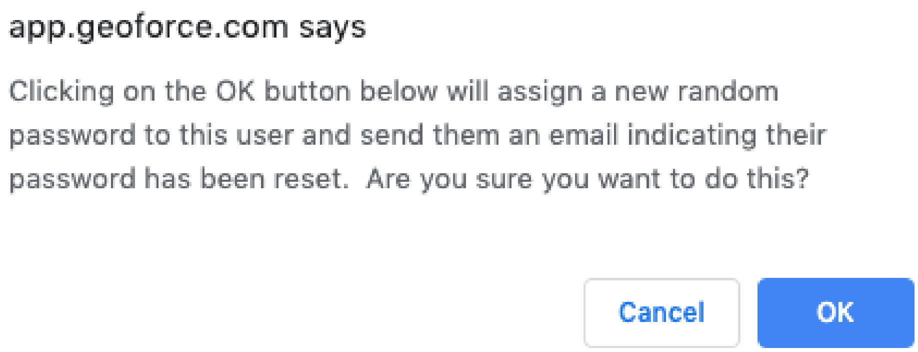
To change your own or someone else's user passwords, click the edit pencil next to their user account and select "Reset Password" from the options on the upper right-hand side.

Change Password- will allow you to update your own existing password (and only your own).

Reset Password - will send a randomly generated password to the user email (for yourself or another user)

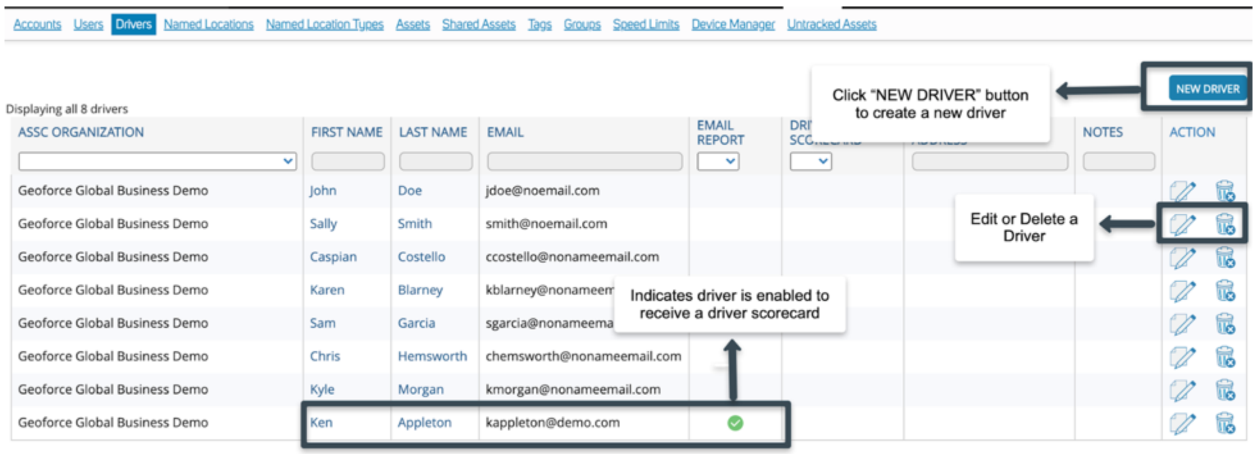
Don't forget to save your changes by clicking the "Save changes" or "Ok" buttons.





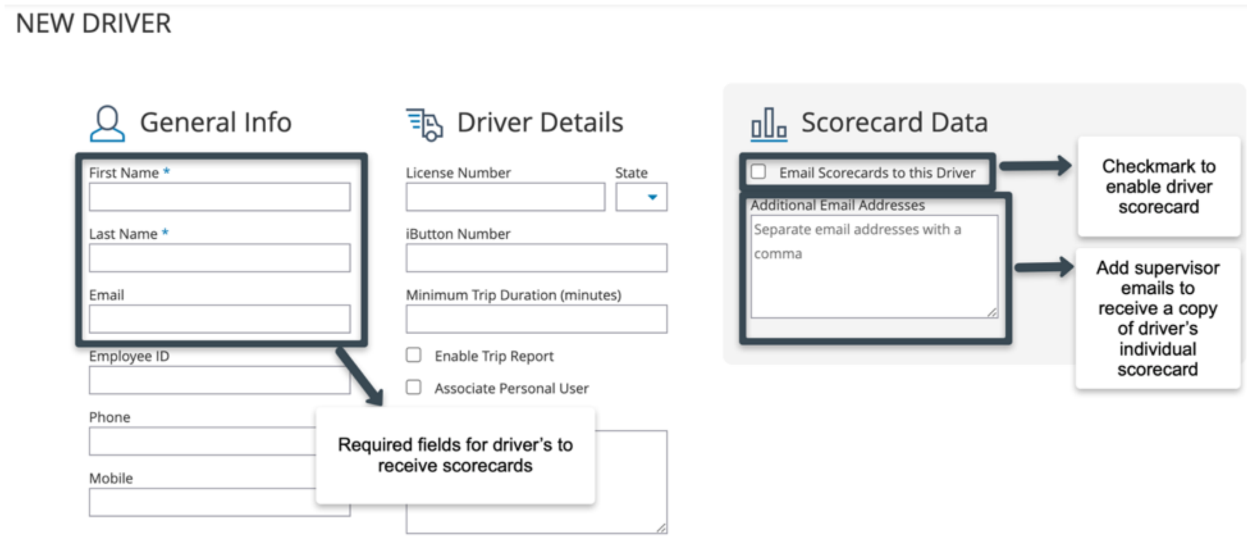
Drivers

On this tab you will be able to add, View, Edit, and Delete Drivers or assign drivers to vehicles.



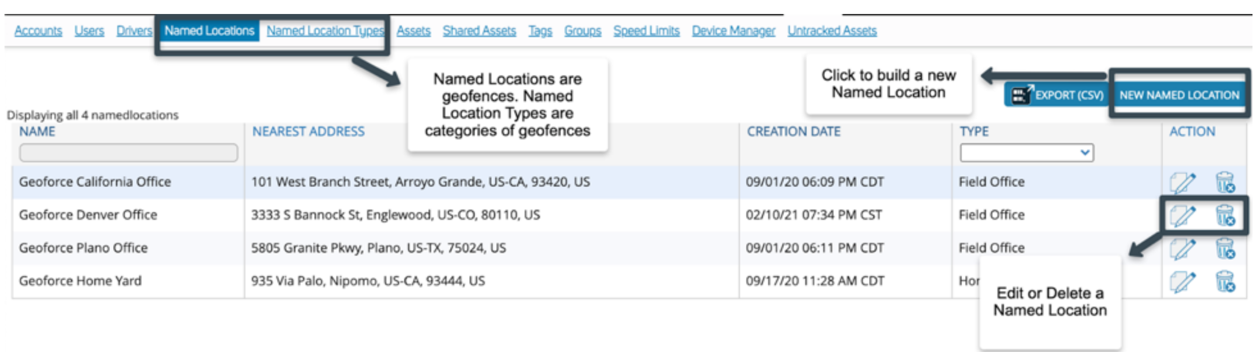
Creating a New Driver

1. Select the "New Driver" button on the right-hand side of the screen.
2. From here fill out the information as desired (First and Last Name, email, etc.). Also check the "Enable Trip Report" and "Email Scorecards to Driver" if you would like to receive these.
3. Click "Save".



Named Locations

Named Locations are used to insert custom geofences around important locations, such as home yards, offices, and work sites. This tab will allow you to see all Named Locations that are created under the account. To create a new named location, click the 'New Named Location' on the top right-hand side of the screen.

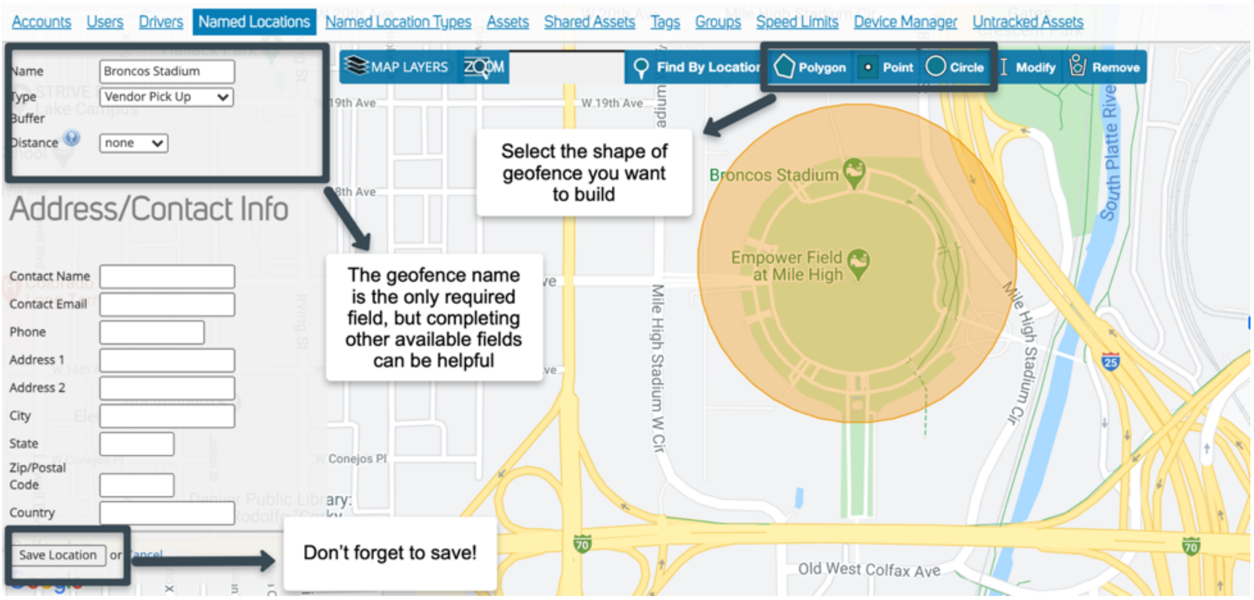


Creating a New Named Location

1. Clicking the "New Named Location" button will take you to the map screen within the application.
2. Navigate to the location you wish to geofence by entering any location information (such as address, or lat/long) into the search bar or finding the location manually on the map.
3. Name your geofence, select a geofence "type" if applicable, and add a site emergency contact if you need.
4. Select what type of Named Location you want to draw by choosing one of the following:

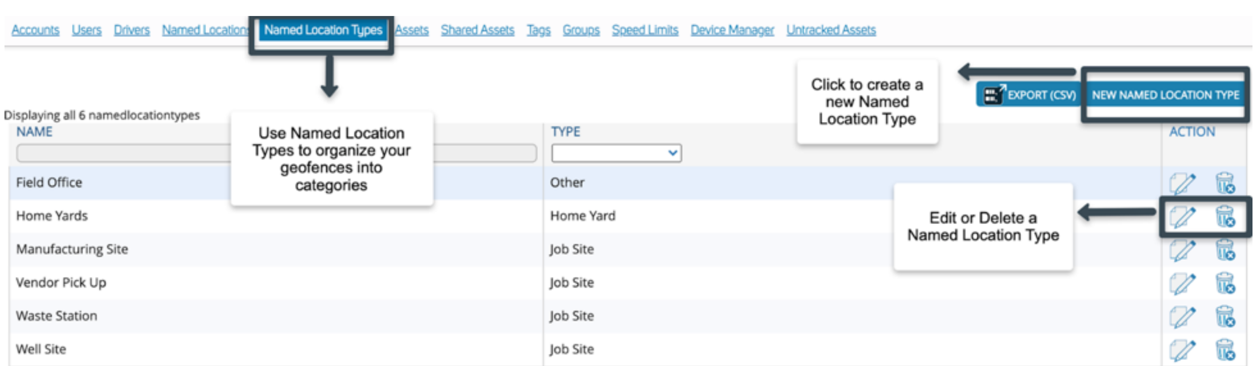
- Radius - a circular geofence with a center point.
- Polygon - customer shape by “connecting the dots.”
- Point - a single point geofence.

5. Once you are satisfied with your geofence, click “Save” on the lower left to exit.



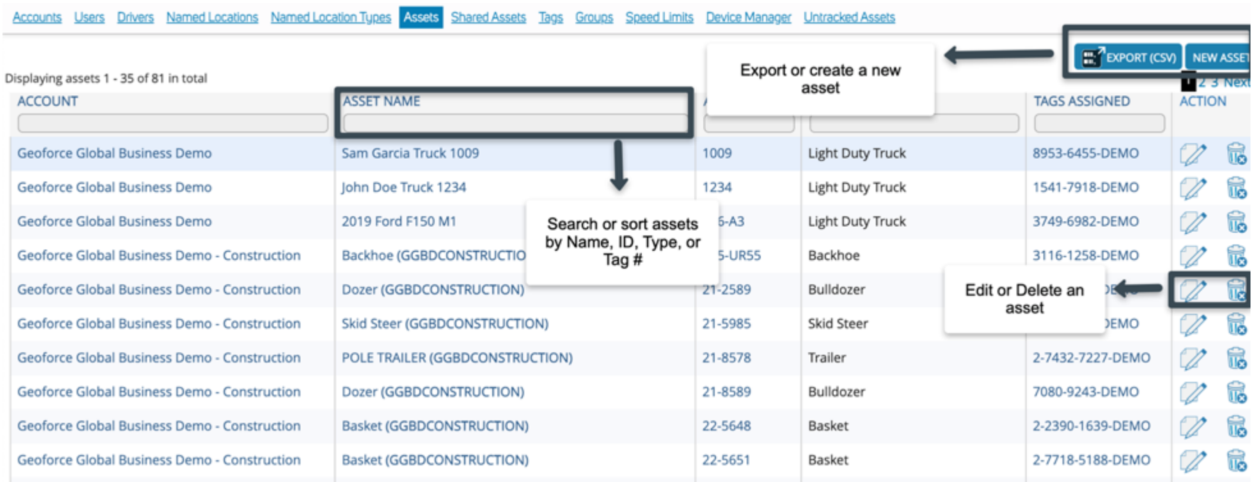
Named Location Types

Here you will be able to create a Named Location type to assign to a Named Location. Example: You can create the type Drop-Off Zone and assign it to any Named Locations that would be considered this type of location. To create a new Named Location Type, you will click on the box labeled “New Named Location Type” on the top right-hand side of the screen.

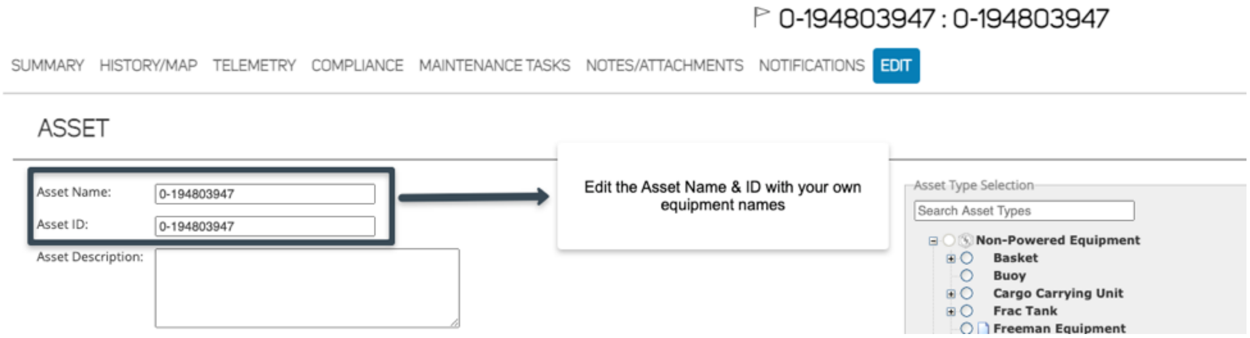


Assets

Under Setup, click “Assets” to view your current assets. Upon account creation, you will have one of two options that have been set up for you in your account:



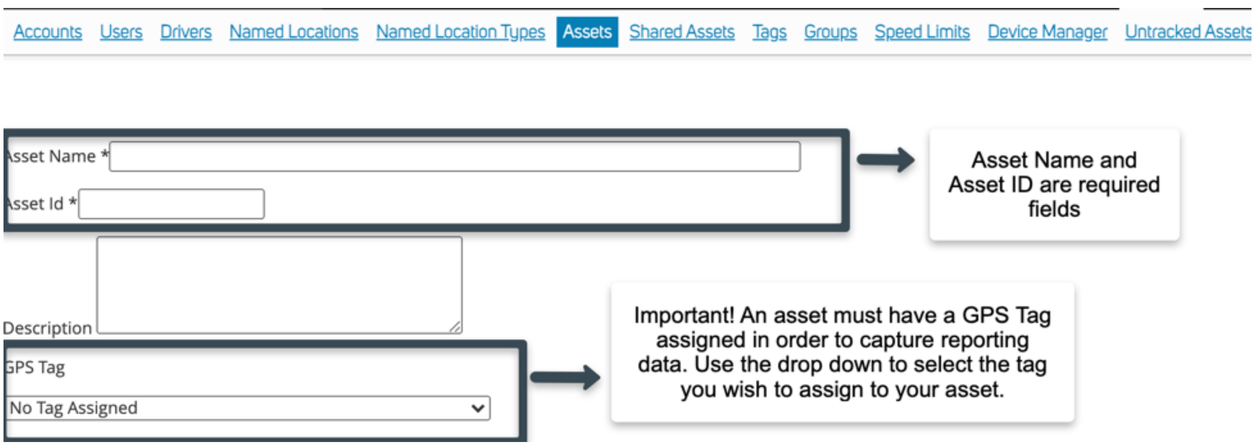
1. Upon shipment, all new tags are loaded into your account as an asset with the same name as the tag ESN (Electronic Serial Number). You will need to edit the assets with the true asset names during account setup.
   a. Click the asset name from the LIST tab.
   b. Select “EDIT.”
   c. Update the Asset Name and Asset ID to your own equipment names.



2. If your tags are missing an asset, or if you have deleted an asset previously, you will need to create a new asset.

Creating a New Asset

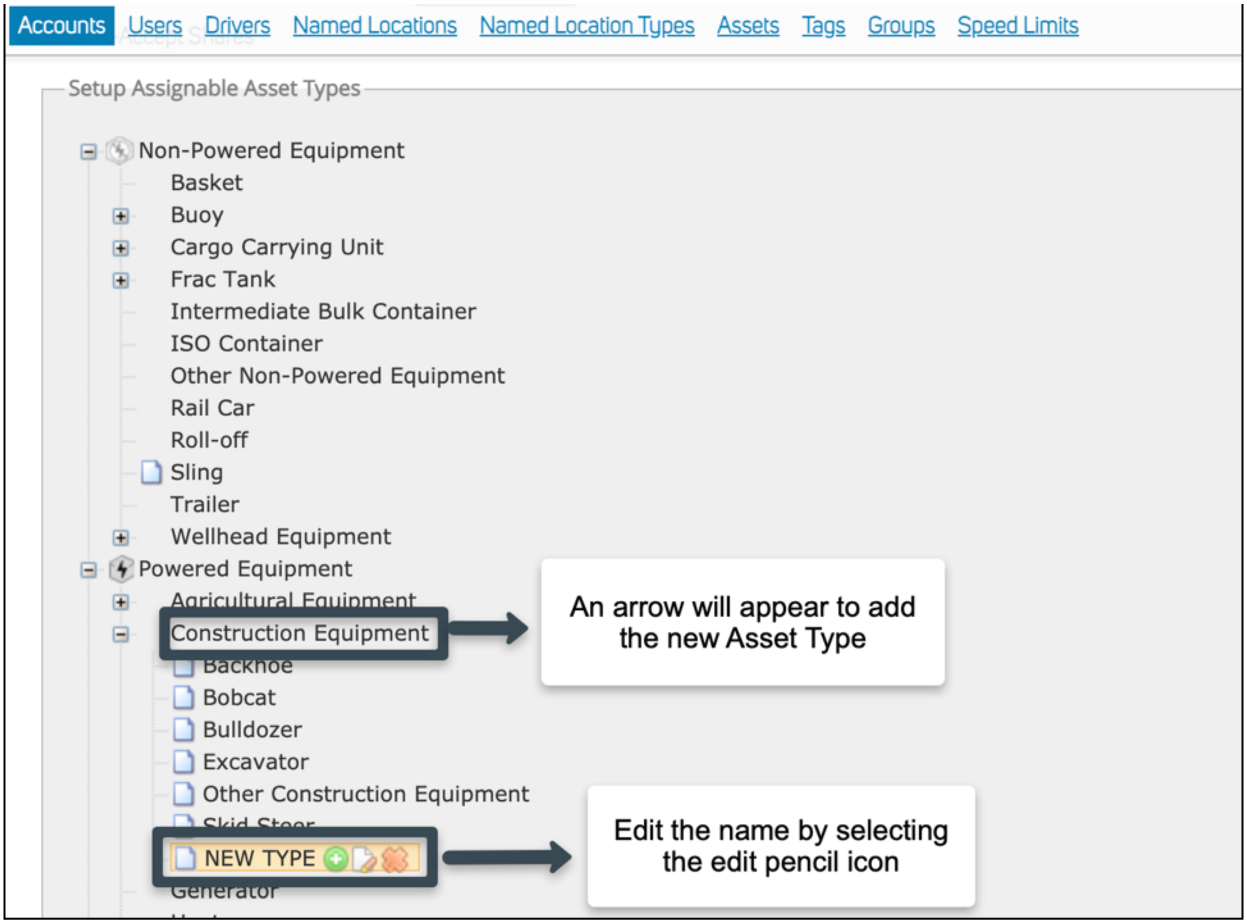
1. Click “New Asset” to open the asset window.
2. Complete the Asset Name and Asset ID fields.
3. Add a description of your asset if you wish.
4. Use the drop down to select a GPS Tag to assign to your asset. The tag must be located in the same reporting account as the asset you are editing. An asset must have a GPS Tag assigned in order to capture reporting data.



5. Select the most appropriate Asset Type for our equipment. If you do not see your equipment type listed, you may create a new Asset Type using the steps in the next section.

Creating a New Asset Type

1. Click on the "Setup" tab, then select "Accounts."
2. Under account name, select the account you want to create the asset type in. (Please note: if you have sub accounts, you will need to create these custom asset types in each account).
3. At the bottom of the page, select "Edit."
4. Navigate to the "Assets and Rules" tab.
5. Scroll down to "Setup Assignable Asset Types." Move your mouse over any listed asset type, and a green plus icon will appear. Click on it.
6. It will create a "New Node#." Hover your mouse over that name, and to the right you will get three options - add another note, rename, or delete. Click rename.
7. Now you can type in that field. Add the name of the asset. Repeat this for as many assets as you need.
8. When you are done, at the bottom of the screen click "Save Changes."
9. The custom asset type is now assignable from the Asset Creation page, or from the Edit tab on the Asset Description Page.

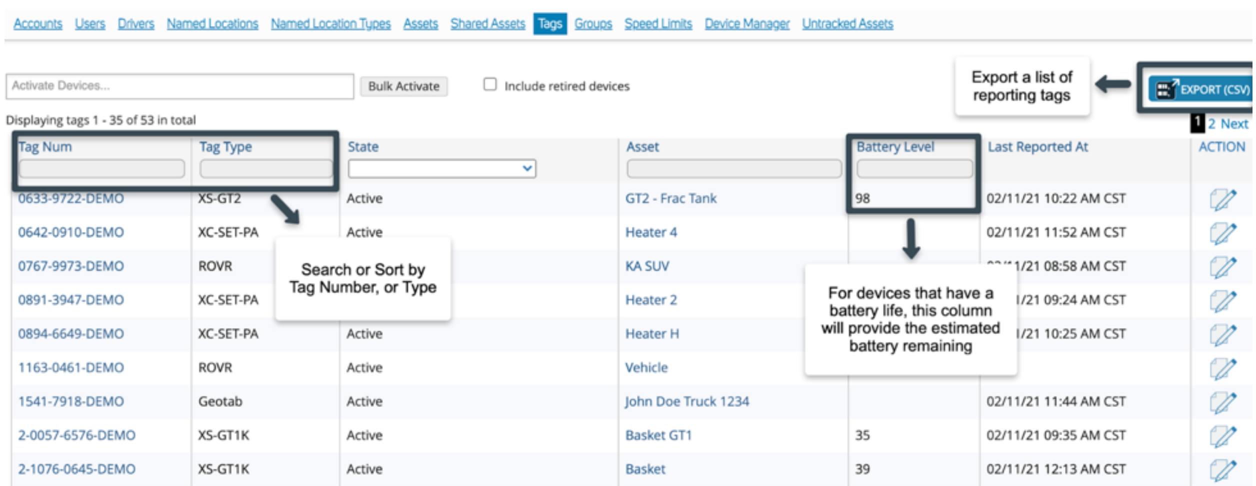


Shared Assets

If you have a ShareTo account, you have the ability to Share Assets. Any Assets that are shared to or from the account will be visible within this Tab. Contact Geoforce for setup instructions on how to use the ShareTo feature.

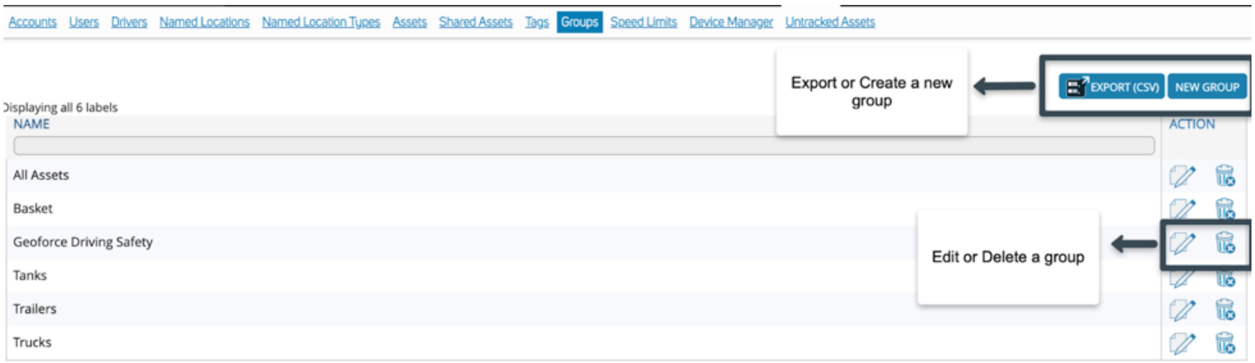
Tags

Under Tags, all active tags within the account will appear on this page. This page will also show any assets that are assigned to the tag and time the tag last reported. If you wish to see your retired devices, check the box for “Include retired devices.”



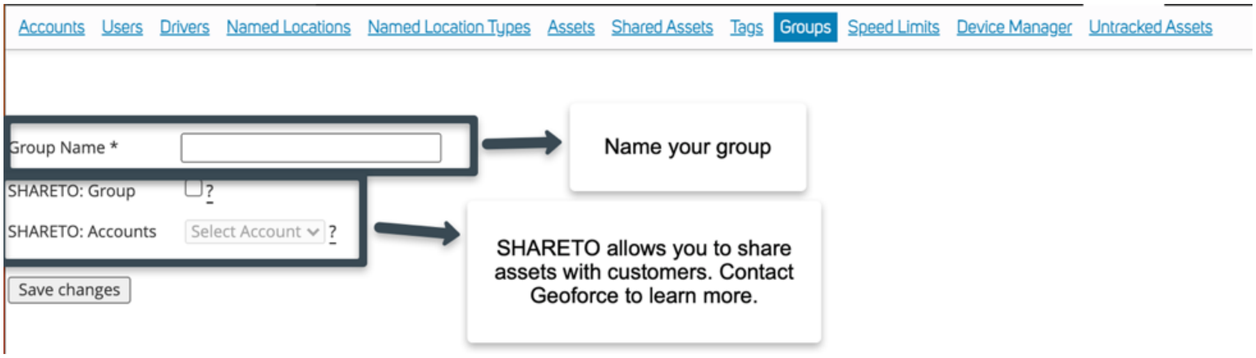
Groups

This tab is where you will find all the groups created under this account. Groups allow you to organize your equipment into certain categories in order to set notifications, rules, or run reports off those categories. Typically, these can be functional, geographical, or equipment types.



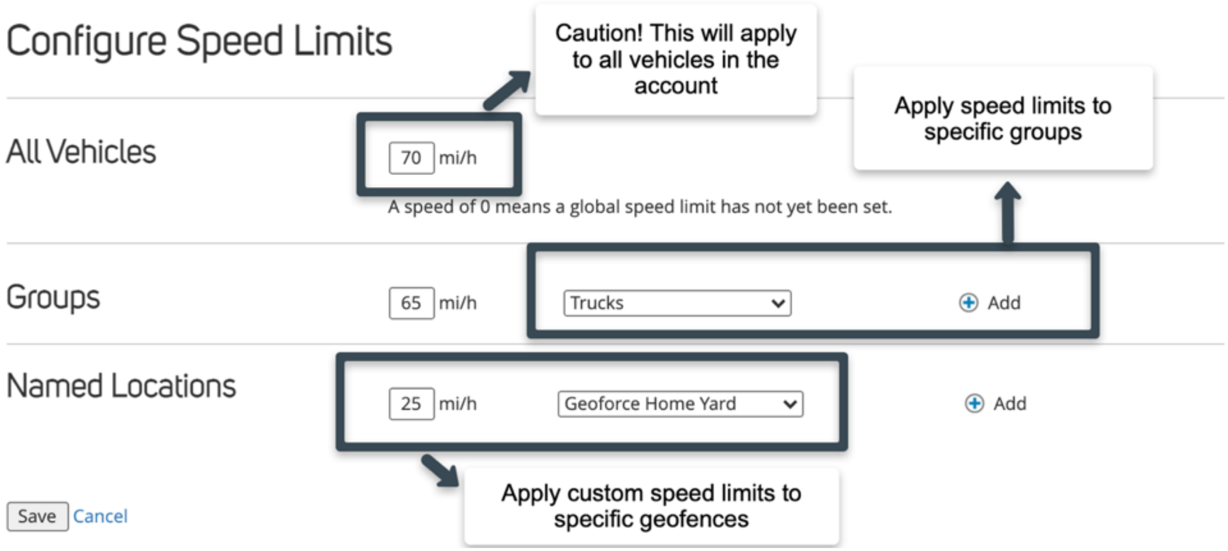
Creating a New Group

1. Click “New Group” to open the group editing window.
2. Name your group.
3. Select “SHARETO: Group'' if you want to create a group that is tied to a SHARETO account. Unlike normal groups, assets that are in a SHARETO account are added and subtracted programmatically when you share and unshare assets to the associated SHARETO account. Contact Geoforce for more information on SHARETO accounts.
4. Do not forget to save your changes.



Speed Limits

Under this tab you can configure the speed limit for the account that would apply to all vehicles. Example - setting a speed limit for 70 mph will trigger speeding events for all vehicles who go over that speed (regardless of posted speed limits). You can also assign specific speed limits to specific groups and Named Locations.



Device Manager

Device Manager has several capabilities: managing device reporting, more in-depth reporting, and device health. This only works for specific device types. In order to gain access to this, please reach out to your Account Manager or helpdesk@geoforce.com. *See more details in the Device Manager section of this user manual.

Untracked Assets

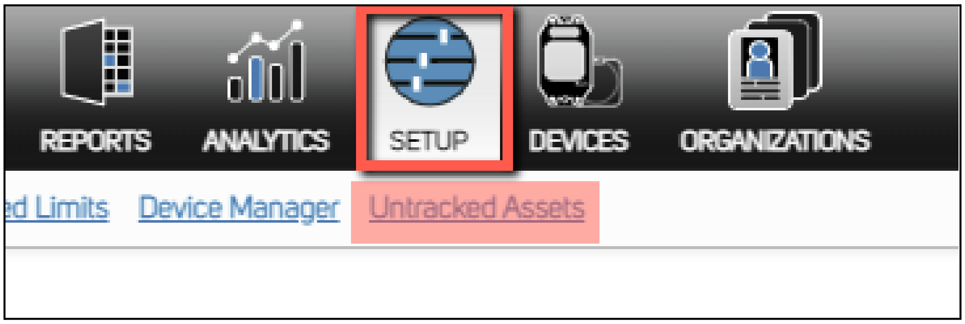
Untracked Assets are assets without a tracking device. Untracked Assets can include things such as slings, wooden crates, toolboxes, or other equipment that do not need trackers, but are rather tracked via an associated Tracked Asset. In order to gain access to this, please reach out to your Account Manager or helpdesk@geoforce.com.

Navigating to Untracked Assets

Users must set up one or more Untracked Assets to associate them to a Tracked Asset. This is done from the “Untracked Assets” tab within the Setup application.

To navigate to the Setup Asset Page please use the following steps:

1. Click on the Setup Icon
2. Locate the “Untracked Assets” Tab



Creating Untracked Assets

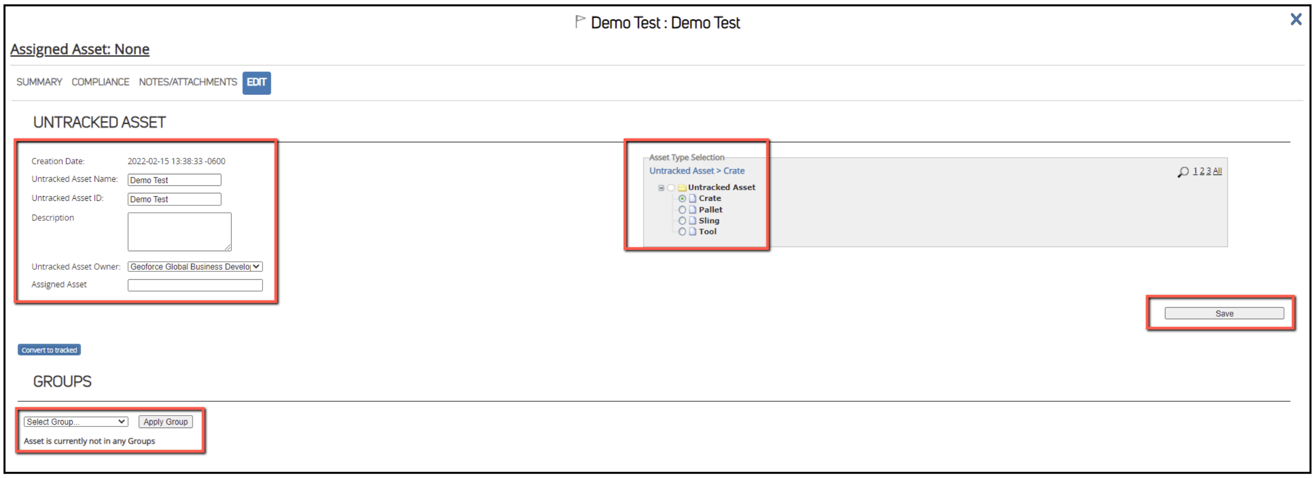
1. To create an Untracked Asset, select the “New Untracked Asset” button on the right side of the screen.

2. Fill-out the following fields and select “Save Changes”
   a. Asset Name
   b. Asset ID
   c. Description
   d. Assigned Asset (if any)
   e. Asset Type

3. Once you click "Save Changes" the Untracked Asset Should appear on the list and a notification box should appear indicating it was successfully created.

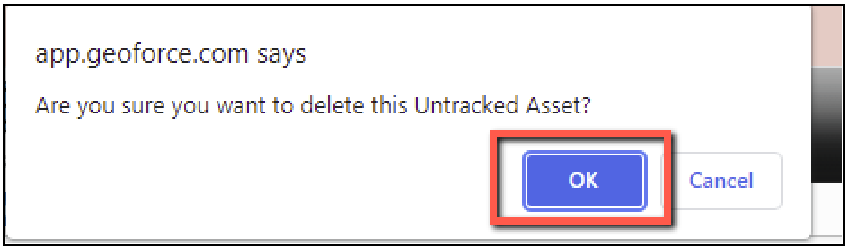
Editing an Untracked Asset

1. To edit an Untracked Asset, select the Pencil and Paper Icon next to the desired Untracked Asset.
2. From here, make any desired changes to the Untracked Assets such as Asset Name, Asset ID, Asset Type, Assigned Asset (if any), Assigned Group, etc and click "Save" on the right side of the screen.



Deleting an Untracked Asset

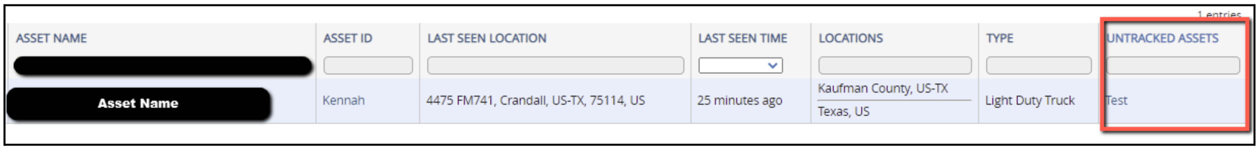
1. To delete an Untracked Asset, Select the Trashcan Icon next to the desired Untracked Asset.
2. Once selected, a box will appear asking if you are sure you want to delete the Untracked Asset. Select "OK" and the Untracked Asset will be deleted.



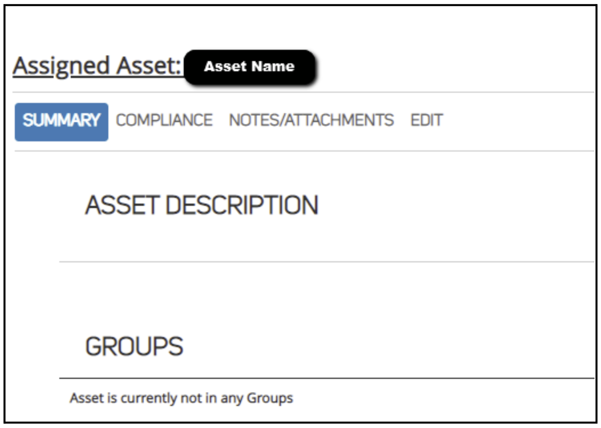
** Please note, once an Untracked Asset is deleted, it is not able to be recovered. Please ensure to only delete if you no longer need the Untracked Asset.

Untracked Asset (List View)

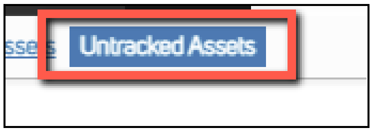
The Untracked Assets will be available on the right hand side of the screen under List View.



Clicking on the Untracked Asset Name will bring up the Untracked Asset Detail Page. From here you can edit the Untracked Asset or view the information.

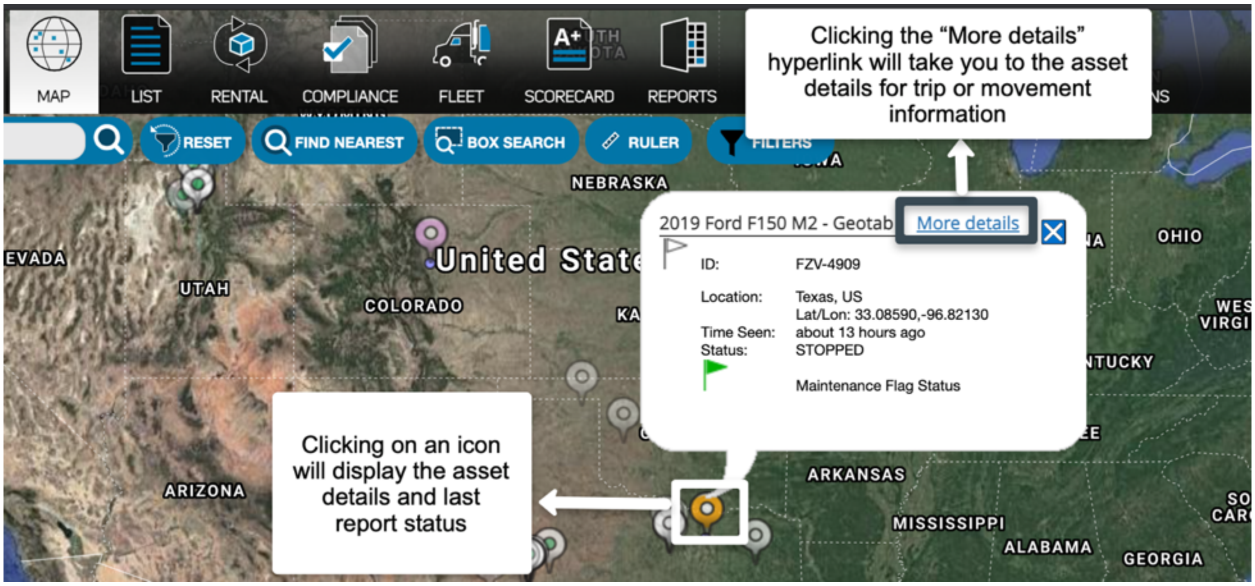


To view all Untracked Assets through List View, select the Untracked Assets button on the top of the screen.



Map View

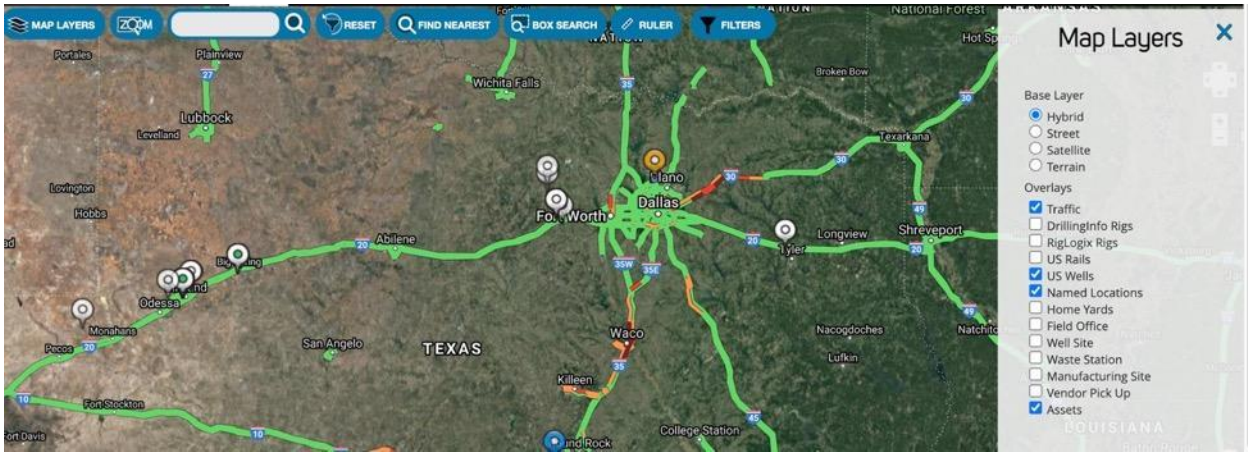
The Map View will give you an overview of your assets on the map. From here you can zoom in to see where the assets are located, search for specific assets, and filter different map layers.



Map Layers

Map layers are image files loaded on top of the map. Map Layers can be used to identify important areas of your operation or specific needs, such as rail lines, or wellsites. To add a Map Layer to your map, select the "Map Layers" button on the top left, and choose which layers you want to overlay. If your company has specific needs for map layers, reach out to Geoforce to inquire about the process to get them added.

You can also adjust your main map visibility by Street, Satellite, Terrain, or Hybrid view from the Map Layers menu.



Map Functions

Zoom

On the right-hand side of the page there are "+" and "-" signs. These are used to zoom in and out of the page. You can also double click on a certain area to zoom in closer. On the bottom right-hand side of the page, you will see the Zoom Level. This will show you the level of zoom that the page is currently at.

Search

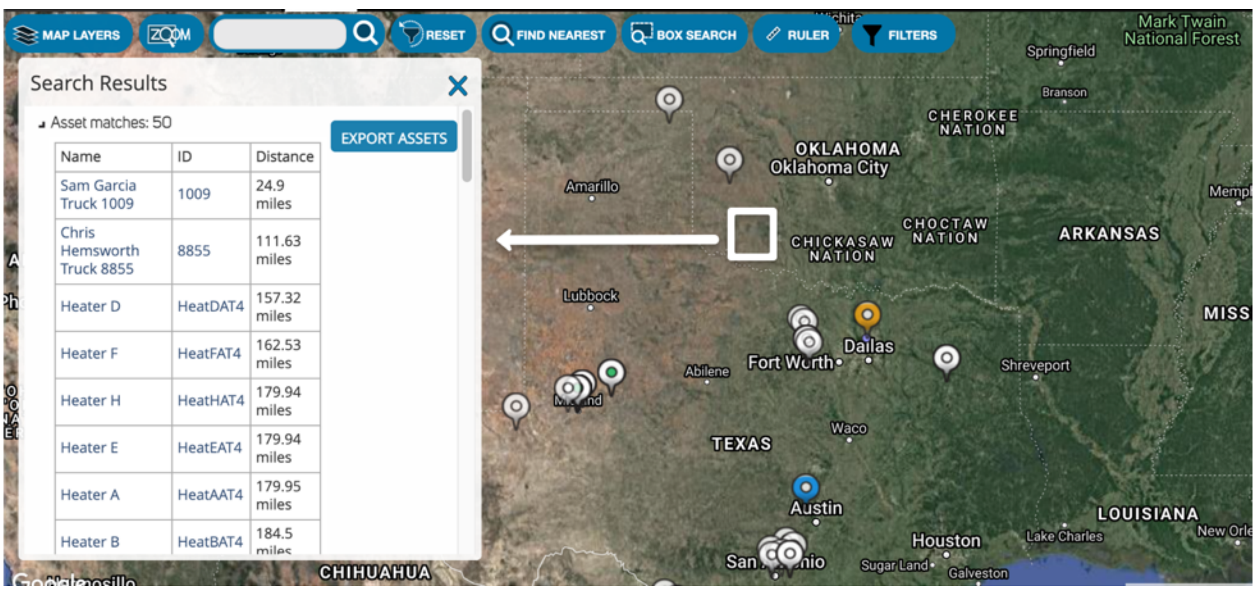
Under the Map Icon there is a search bar. Within this search bar you can search for an Asset by ID or Name, Named Location, Address, Latitude or Longitude, etc. To search, type in the information then select the magnifying glass and the results will appear below on the map.

Reset

This button will reset the map view back to the original settings. It will reset all map layers, zoom levels, and any other map feature you have enabled.

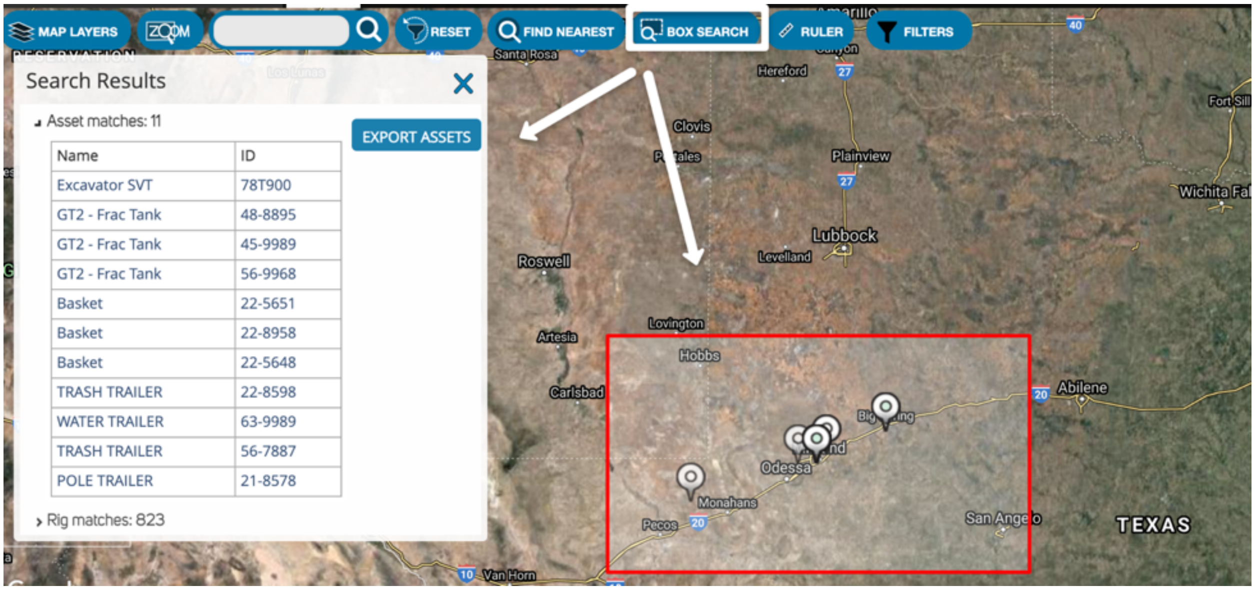
Find Nearest

This function allows you to tap a point on the map to return a list of all the assets nearest that point, starting from the closest. You can use this to assess who is the closest to a job for dispatching or export the list to a field supervisor.



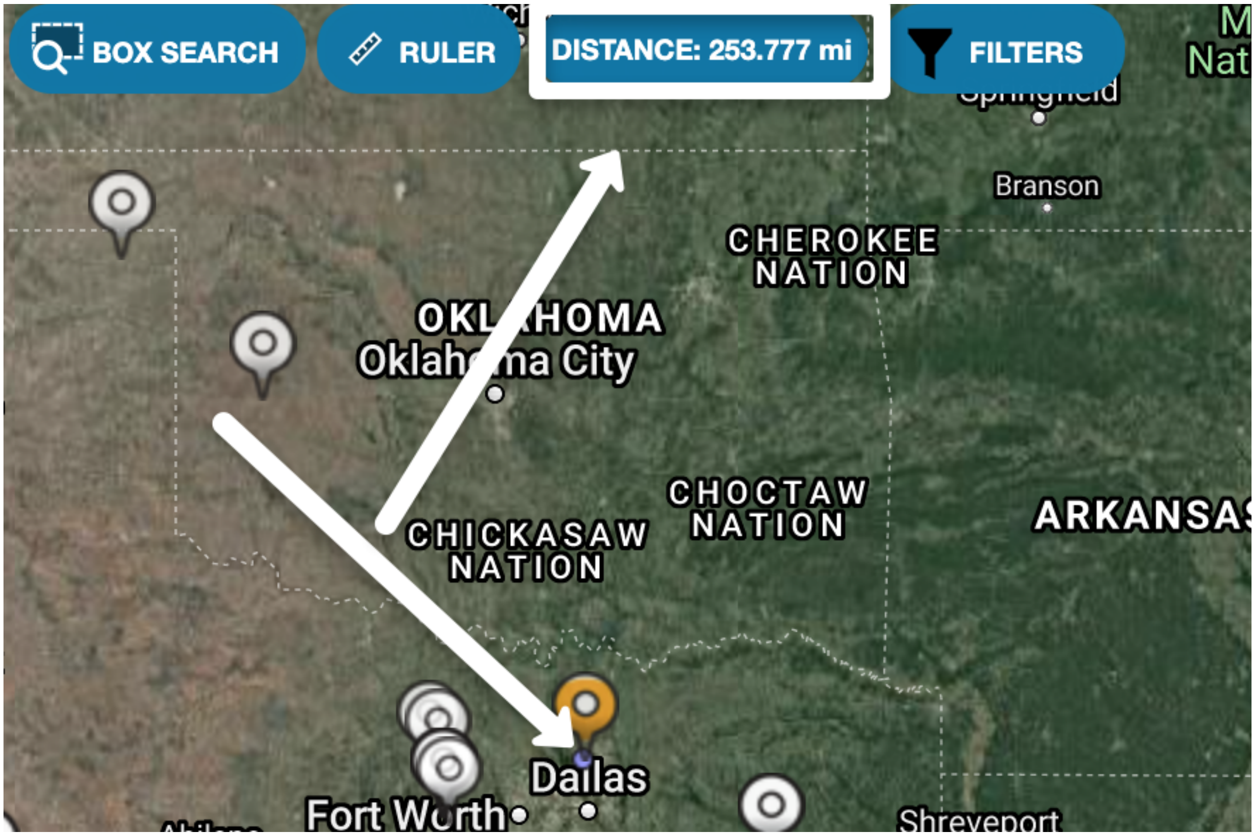
Box Search

This function allows you to draw a box over an area to return a list of assets found within that area. Click on "Box Search" on the top of the screen and draw a box over the area you want to search. Once you release the box, a list of assets will appear on the left of the screen with all the assets reporting within that boxed area. Export the list if you need.



Ruler

The ruler will tell you a distance between two points or multiple points. To use this, click “Ruler” on the top of the screen and click on point one, then scroll to point two and click to set the ruler. The distance will appear on the top of the screen next to the ‘Ruler’ button. To exit this mode, double click on your second point. You can also find the distance between multiple points by clicking on Point A-B, then Point B-C and the total will accumulate in the “Distance” box next to the “Ruler” box.

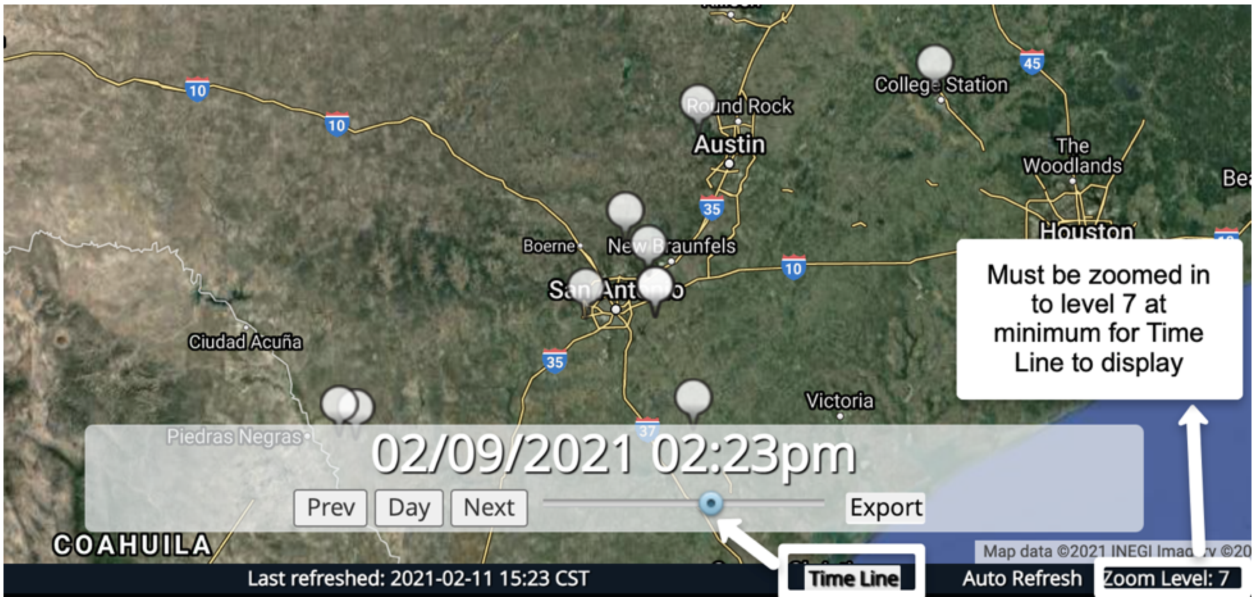


Filters

Filter allows you to narrow your tag list on the map to only display those that match attributes you select. When you click the Filter button, a menu will appear on the right side of the screen that allows you to select your parameters to filter.

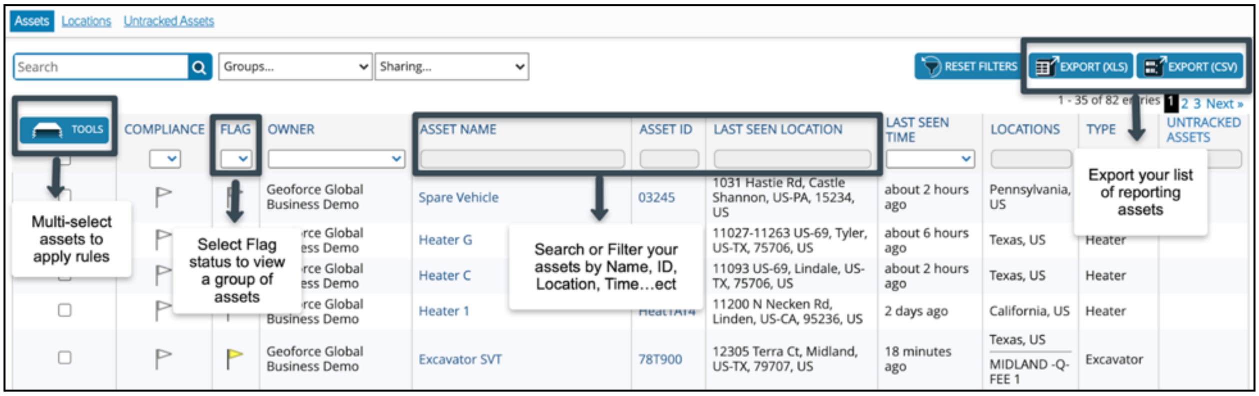
Timeline

In order for this feature to work, you must be zoomed into at least zoom level 7 (shown on the bottom right-hand side of the screen). This will allow you to see where certain vehicles are at specific times on the map. Select the "Timeline" button on the bottom of the map, and it should highlight all your visible assets in white and allow you to use the slider to go back in time to view the history of your assets.



List View

The List View allows you to see all assets with the asset's Name, ID, Last Seen Location, Last Seen Time, any Locations the asset has been on since last reporting, the asset type, and if there are any untracked assets. *The Untracked Assets feature is not enabled within all accounts. For more information, please reach out to Geoforce.*



Viewing & Filtering Assets

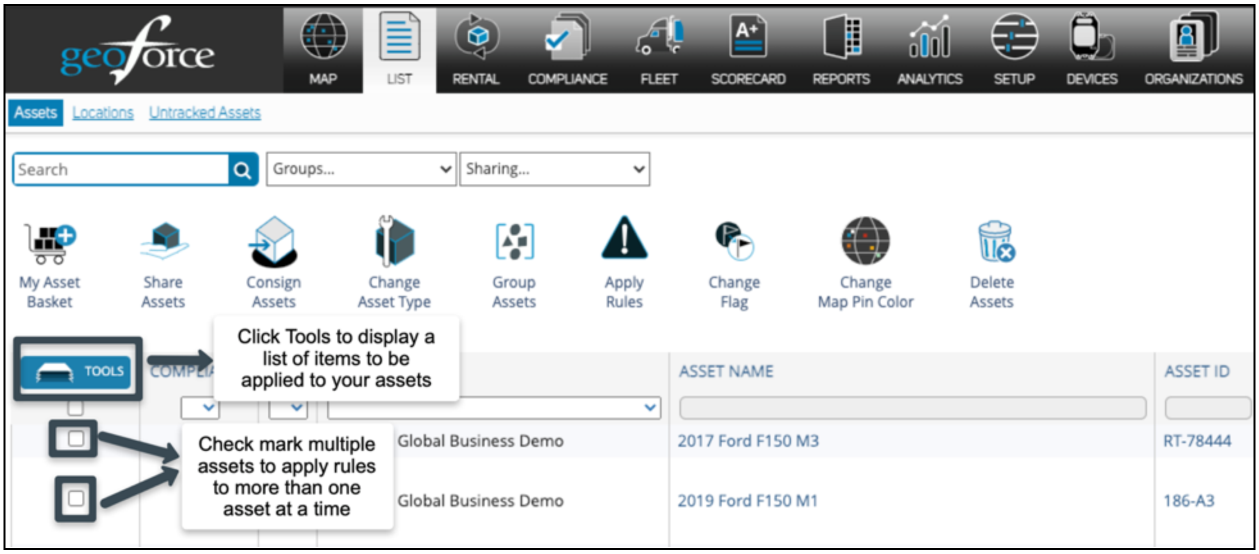
On this page you will be able to view and filter assets. For example, on each of the columns (flag, owner, etc.) you can choose to filter on specific Flag Colors, Asset Owner (If this account has assets across multiple accounts), Asset Name, and so on. To view Asset Details, click on the Asset Name or the Asset ID to be taken to the Asset Details screen.

Exporting Assets

To export the Asset List from the List View, click on the "Export" button at the top of the page. This will download either a CSV File or XLS File to your desktop.

Tools

On the left-hand side of the page, there is a button labeled "Tools". Selecting this option will provide a list of actions you may apply to your assets in bulk.

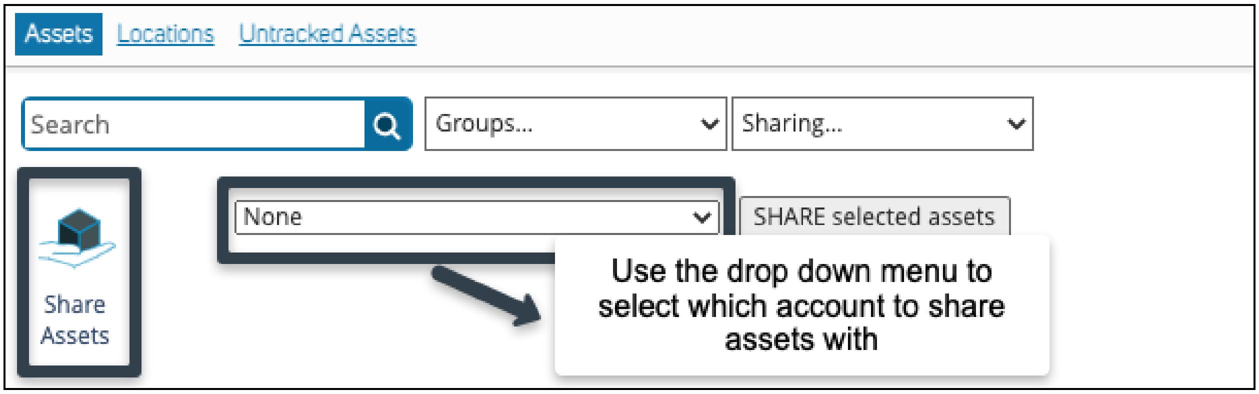


Applying Tools to Assets

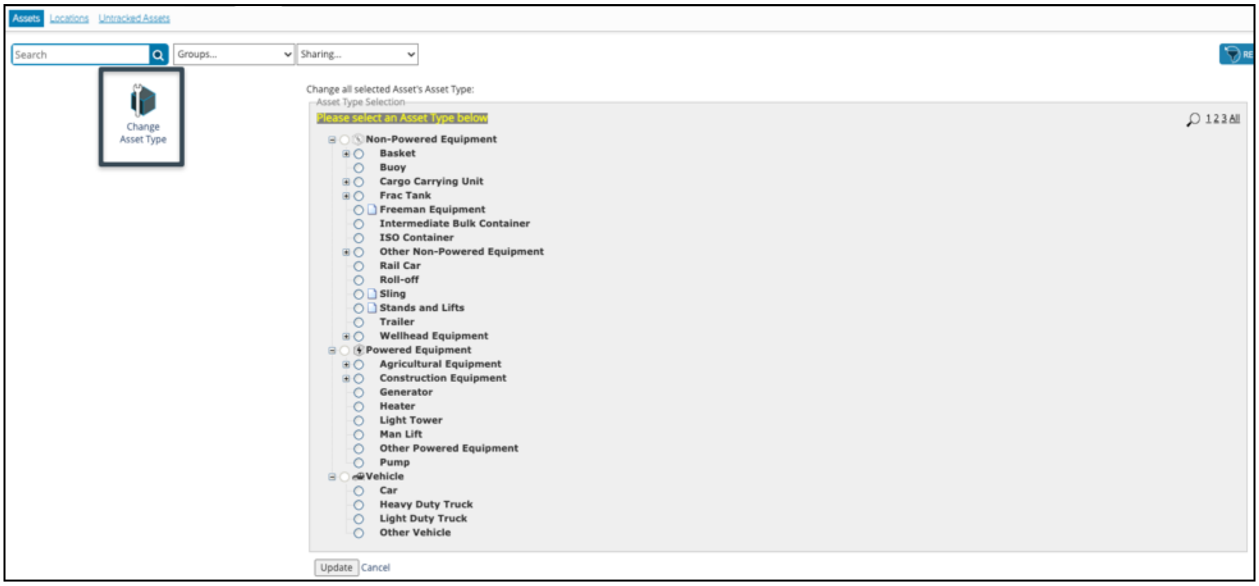
1. Select which assets you want to apply tool options to. You may multi-select the assets manually or use the check box at the top to select all.
2. If you want to apply tool options to only specific asset groups, filter your list view using the group filter first, then “Select All” assets prior to clicking the Tools button.
3. Once you have your assets selected, click the Tools button and choose one of the following options:

    a. **My Asset Basket** - group assets that you will mainly have to see.

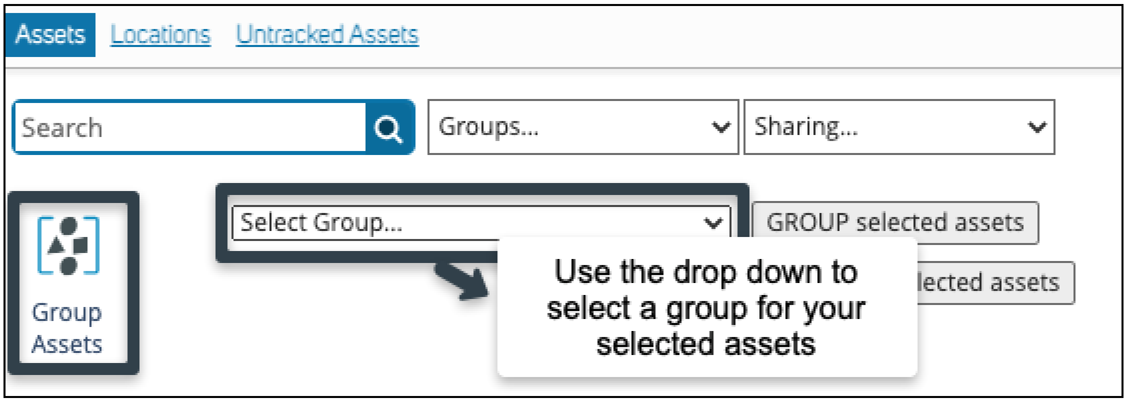
    b. **Share Assets** - share assets with companies if you are using the “ShareTo” feature in Track & Trace.



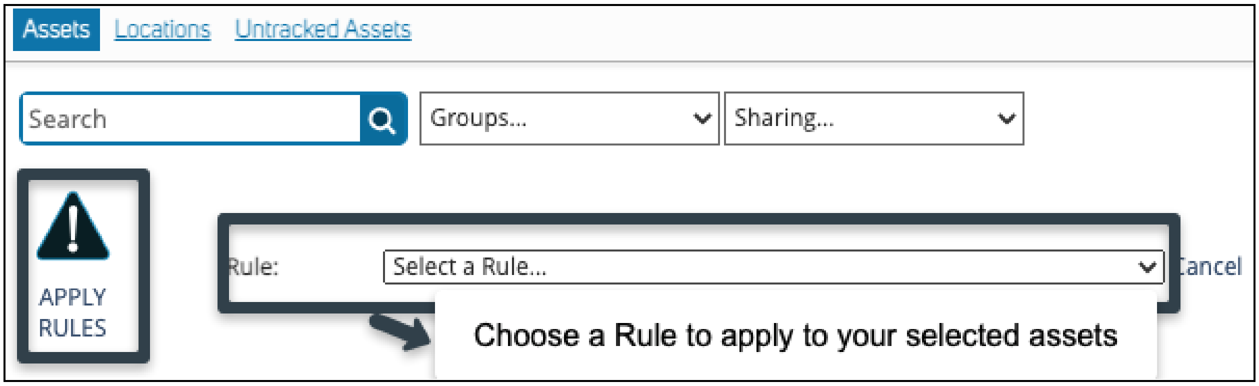
c. **Change Asset Type** - update your asset types in bulk.

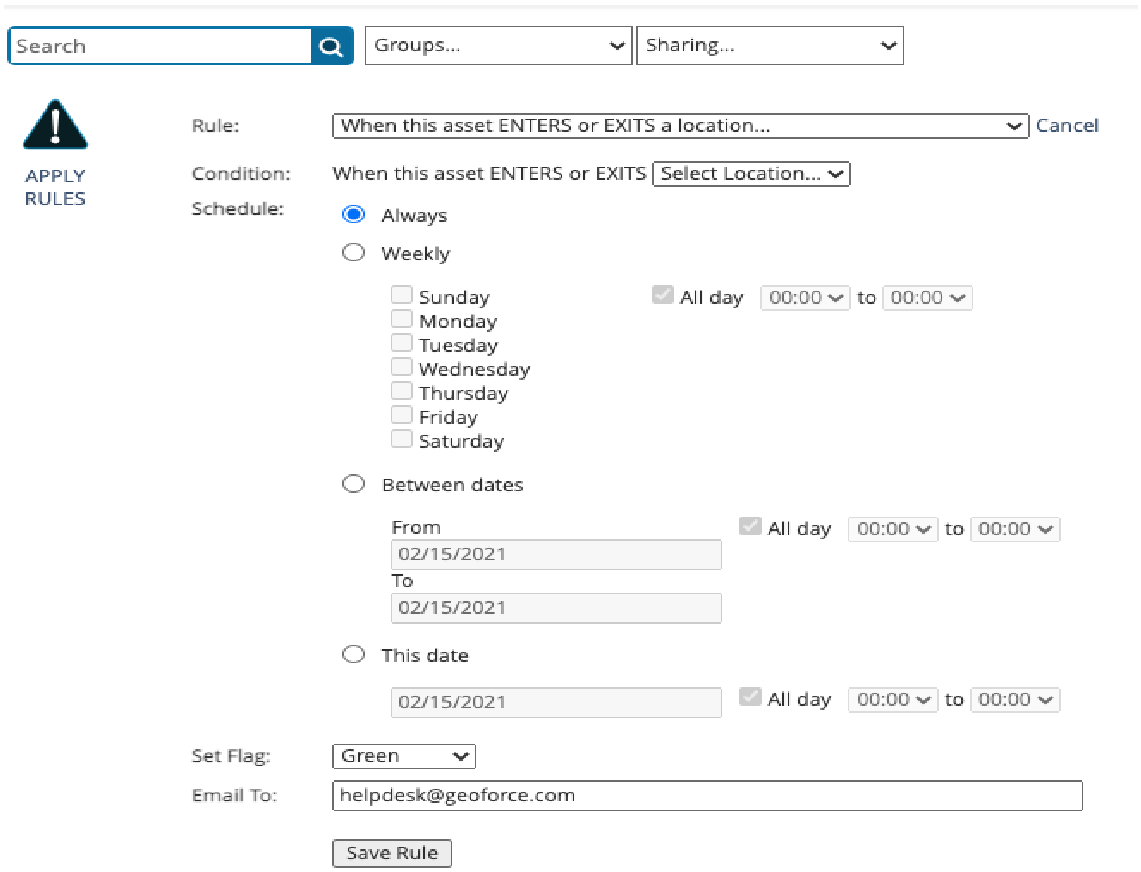


d. **Group Assets** - group your assets into categories by function, type, geographic location, etc. You will have to create your groups first under the “Groups” tab under Setup Tab before you can move assets into those groups.

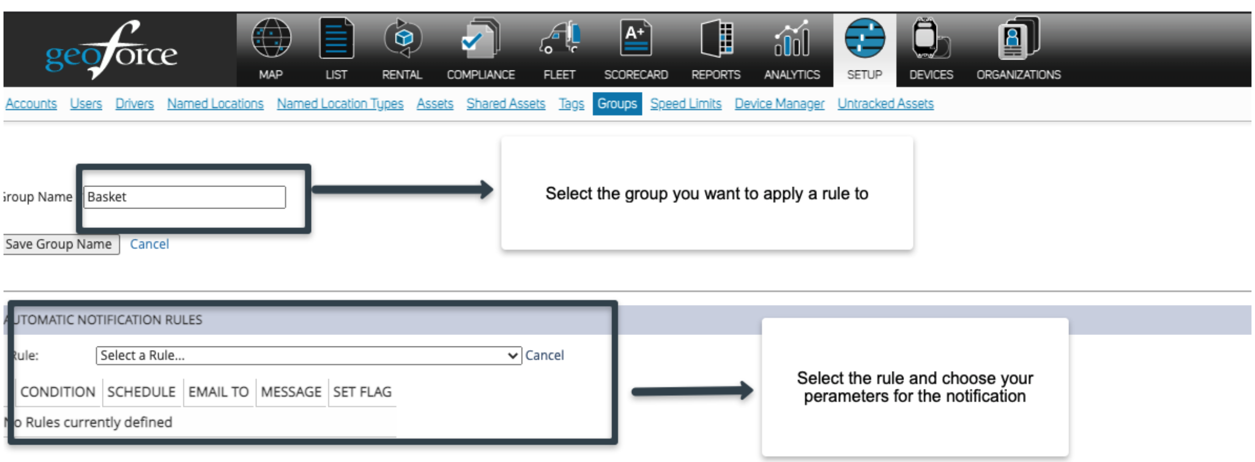


e. **Apply Rules** - you may apply a "Rule" or a notification to assets to be notified in near real time when a rule has been triggered. Select the Rule you wish to apply, then choose your parameters. Each Rule will have its own unique set of parameters you may use to customize the Rule. Notifications may be used in the form of an email, flag color, or via a text message by entering a phone number in email format. (To do this, Google your phone carrier and "Email to text" to get the email address. For example, "888.574.3878@txt.att.net".) *Note- these rules are applied to individual assets in bulk. If you need to delete a rule, this will have to be done on each asset individually.

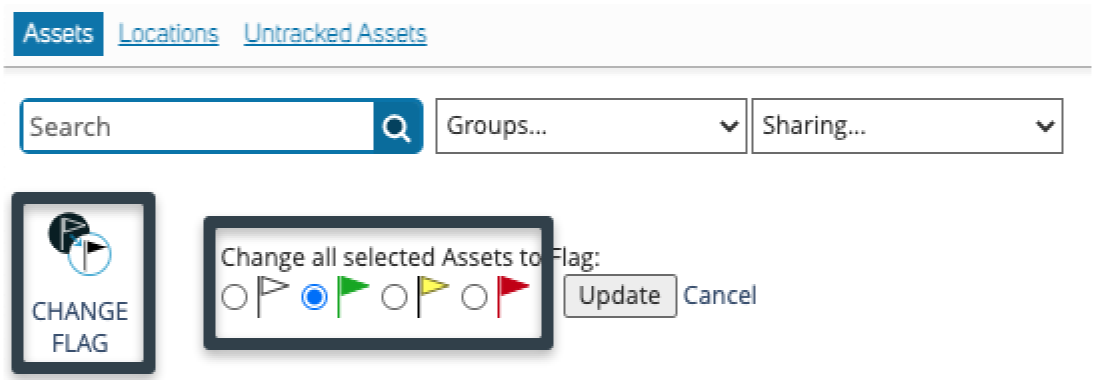




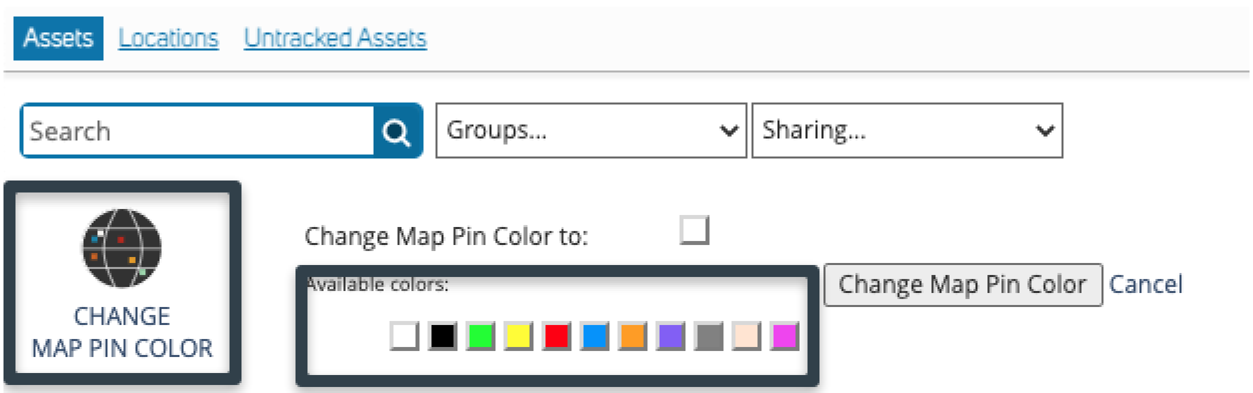
f. **Apply Rules to Groups** –To apply rules to an entire group, that you can then edit for the entire group, you can do this through the group's tab under SETUP > GROUPS.



g. **Change Flag** - manually assign a flag color to your assets to provide a visual indication of an event. For example, you may want to set a red flag color to any assets that are under repair and move them back to a green flag once they are ready to be deployed.

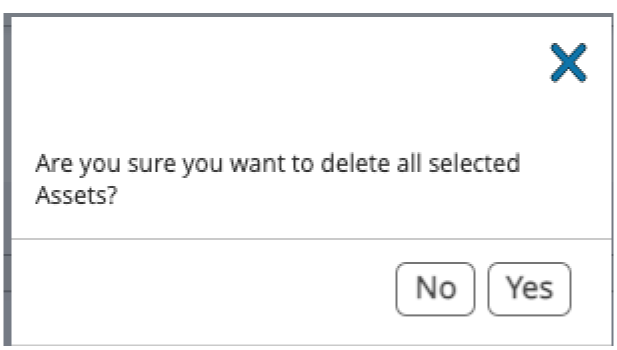


h. **Change Map Pin Color** - adjust the map pin color of any of your assets as a visual representation of groups of assets, asset status, function, etc.



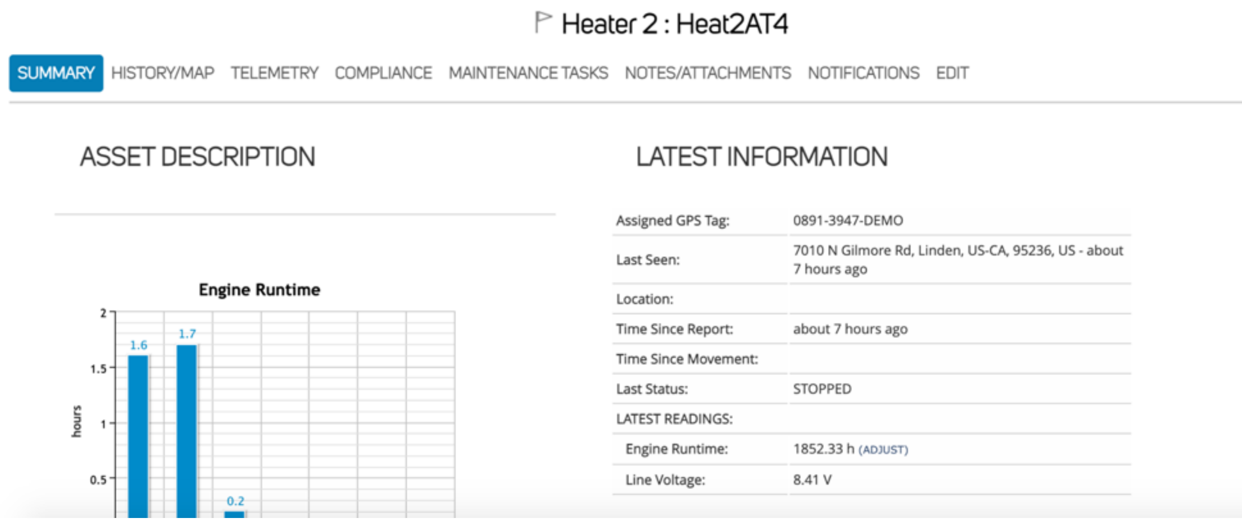
i. Delete Assets - use this option only if you wish to delete an asset from your account and **do not need to preserve history**. **We recommend always using caution with this option.** The best practice is to group historical assets into their own archived group, unlink the tag associated with it, and keep in the account in case you need to access the history. ***Please note** – deleting an asset does not deactivate your device subscription. Contact Geoforce for more info.

j.



Asset Details

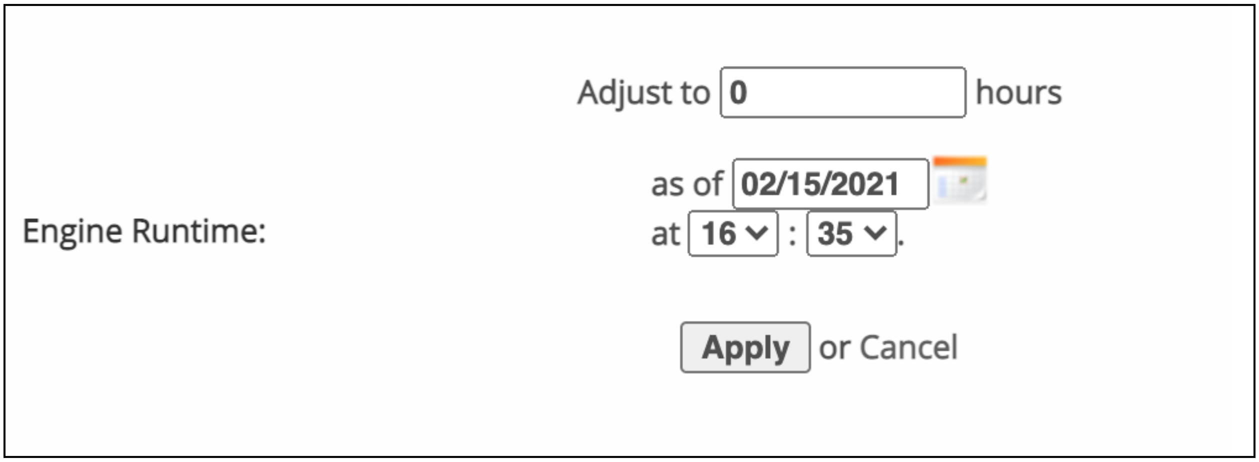
The purpose of the Asset Description Page (ADP) is to provide overview details on the individual asset including where it has been, the telemetry, notifications, etc.



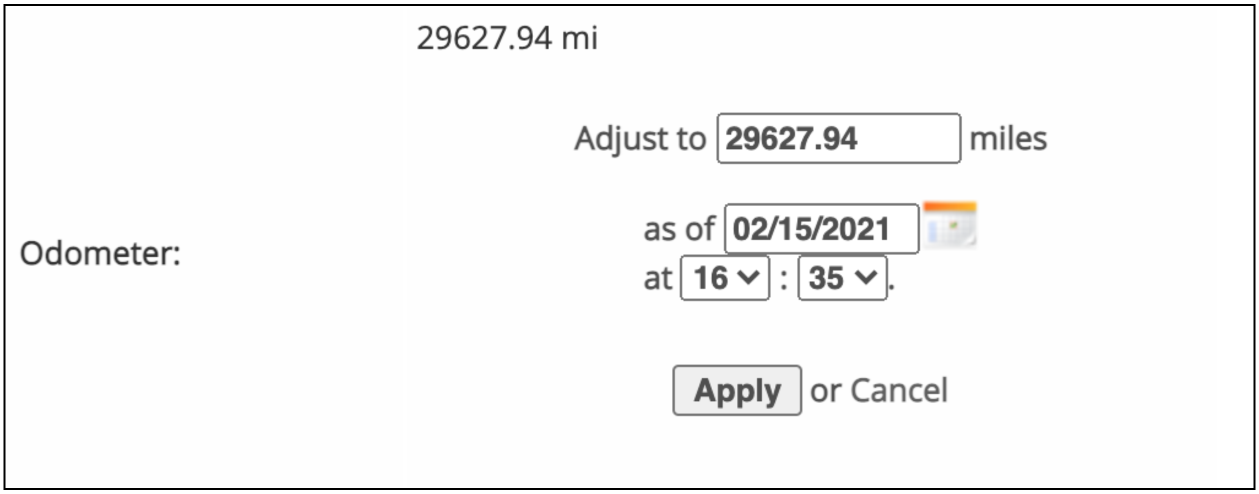
Summary

1. **Asset Description-** This space, which can be filled in on the Edit tab, is an open space for any information about the asset that you want to be easily seen when the asset is first clicked on. This is not searchable information, however it will come up if you Export the List View tab into a CSV report.
2. **Latest Information-** Depending on the kind of device you have purchased from Geoforce, there could be a variety of different fields found within this space.
    a. **Assigned GPS Tag-** This is the serial number you will find on your device.
    b. **Last Seen-** Geolocated Address (or Latitude/Longitude) of your device, as well as how long ago it was last seen (reported).
    c. **Location-** Any additional location information, such as a Named Location.
    d. **Time Since Last Report-** Last time your device reported (listed in minutes, hours or days).
    e. **Last Status-** This has two settings, STOPPED or MOVING, indicating that when your device last reported in, it was either in transit, or stopped.
    f. **Latest Readings**
        i. **Engine Runtime-** This counter will start at zero when you install your device, but you can (and should) adjust it to the current engine runtime

listed on the asset you have installed your device on. To do this, click "Adjust" Fill out the hours, and add the time frame of when you verified those hours on your asset, then click "Apply." The engine runtime will adjust to the time run since then. ***Please note** you can only make one adjustment per 24-hour period. It could also take up to 24 hours for your adjustment to display on the platform.

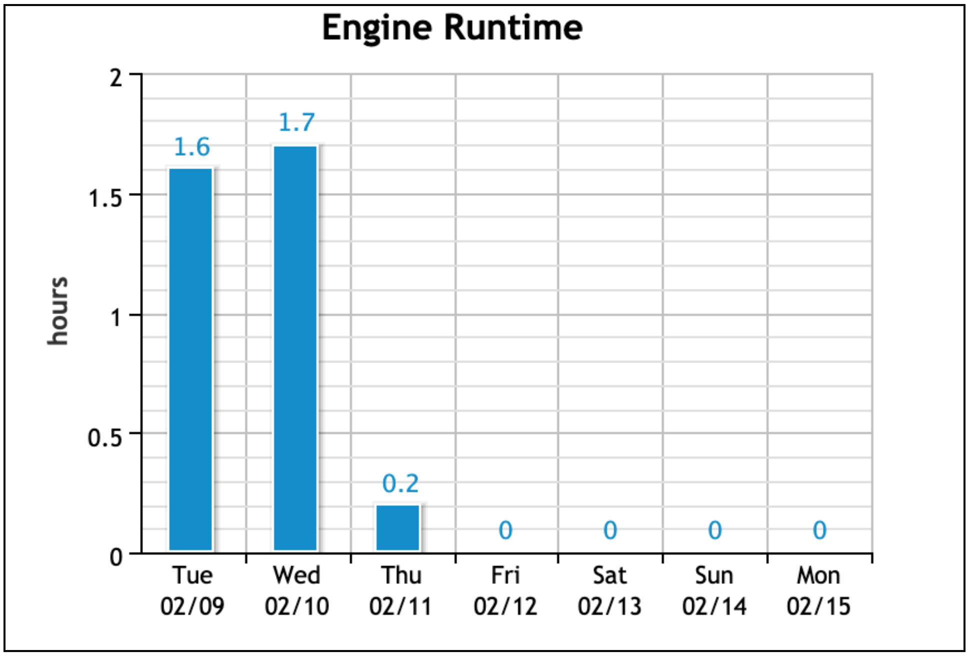


i. **GPS Odometer-** This counter will start at zero when you install your device, but you can (and should) adjust it to the current odometer listed on the asset you have installed your device on. To do this, click "Adjust" Fill out the odometer, and add the time frame of when you verified the mileage on your asset, then click "Apply." The GPS odometer will adjust to the time run since then. ***Please note** you can only make one adjustment per 24-hour period. It could also take up to 24 hours for your adjustment to display on the platform.



ii. **Line Voltage-** Registered line voltage on your device.

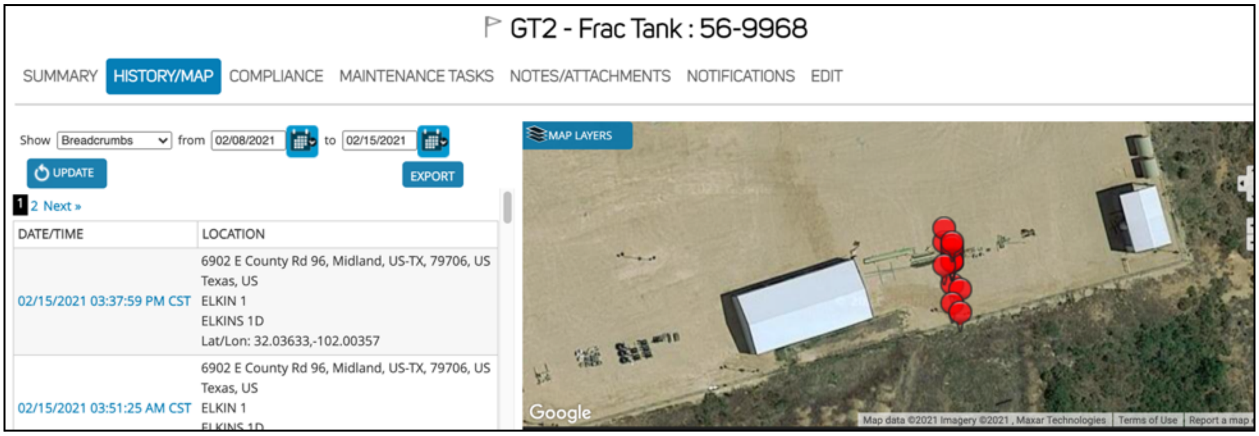
b. **Engine Runtime-** If your device is tracking engine runtime, it will show here as a graph in total hours run per day in the last week. Additionally, you can see this information in the Telemetry tab.



History/Map

This tab is where you can see the breadcrumb history of where your device has been. Using the calendar icons, you can select the time frame you would like to observe, and then select "Update." The system will refresh to show you all of the times that the device woke up and sent a location to the satellite. You can select EXPORT to have the system export that time frame's worth of breadcrumbs onto an Excel spreadsheet.

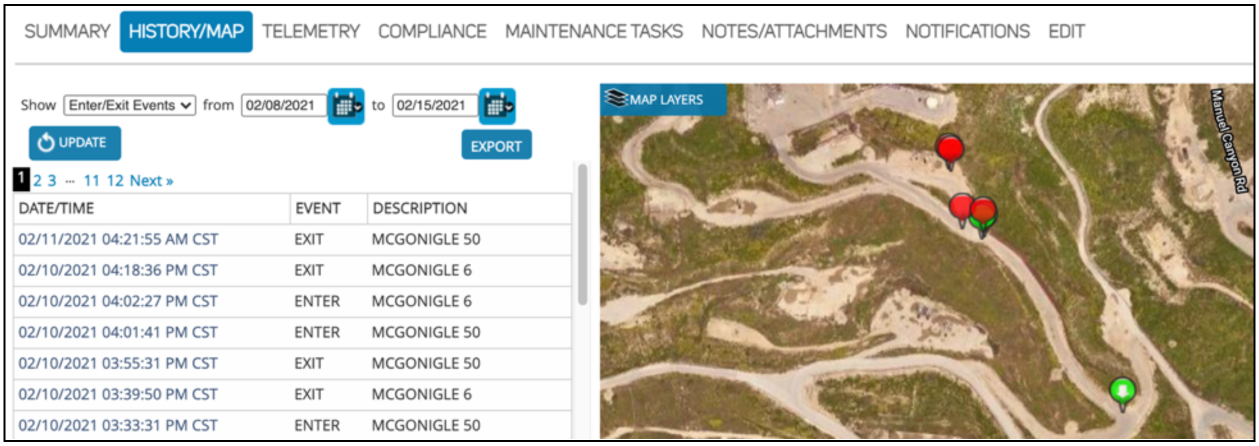
By selecting the DATE/TIME blue text, you can see on the map on the right-hand side where your asset was at that time. Additionally, you can enable MAP LAYERS as an overlay to see any named locations on the map.



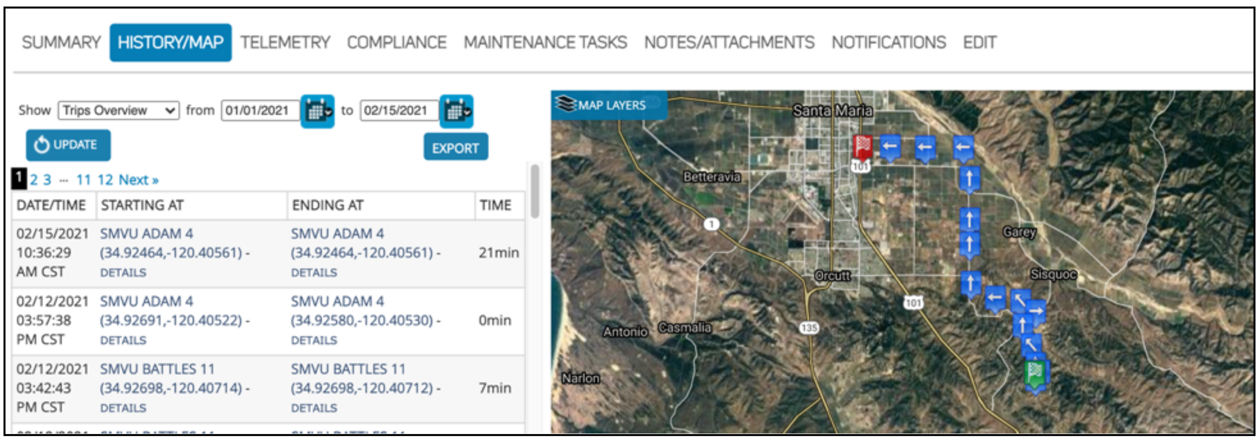
Depending on the device that you have installed on your asset, you may find additional options by clicking on the “Breadcrumbs” drop down menu, including:

- **All Events -** Displays all event types in one feed. Can be exported.

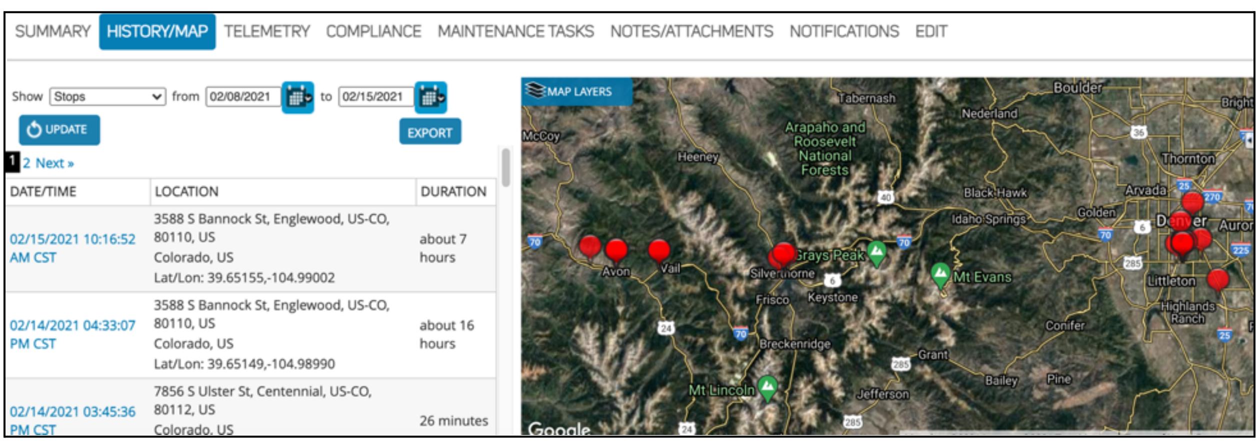
- **Enter/Exit Events -** Any time your asset entered or exited a named location.



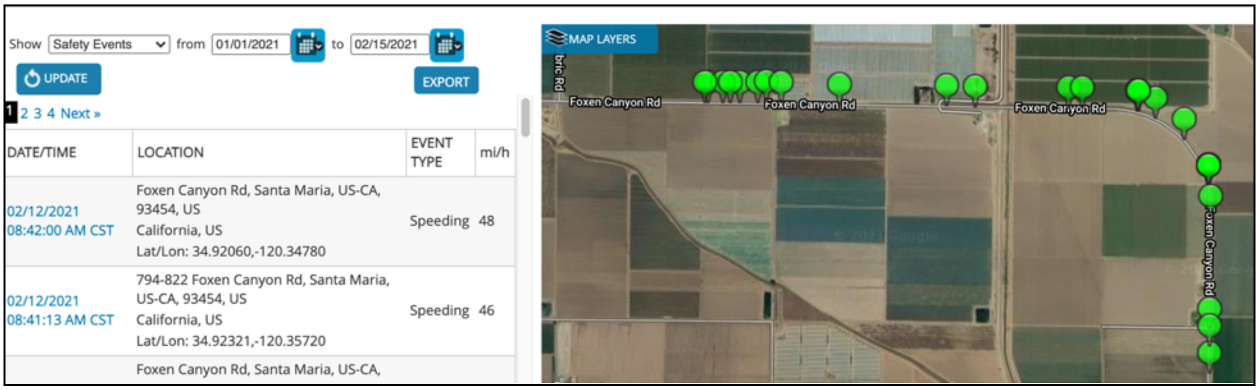
- **Trips Overview-** Displays a record of trips and breadcrumbs.



- **Stops -** Location and duration of a stop (*Vehicle trackers only*).

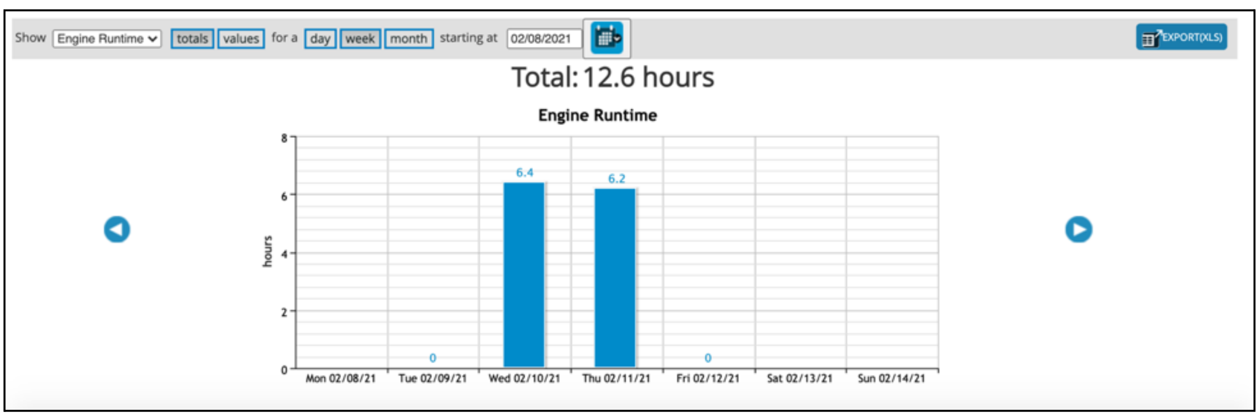


- **Safety Events -** Anytime your asset experienced a safety event (*Vehicle trackers only*).

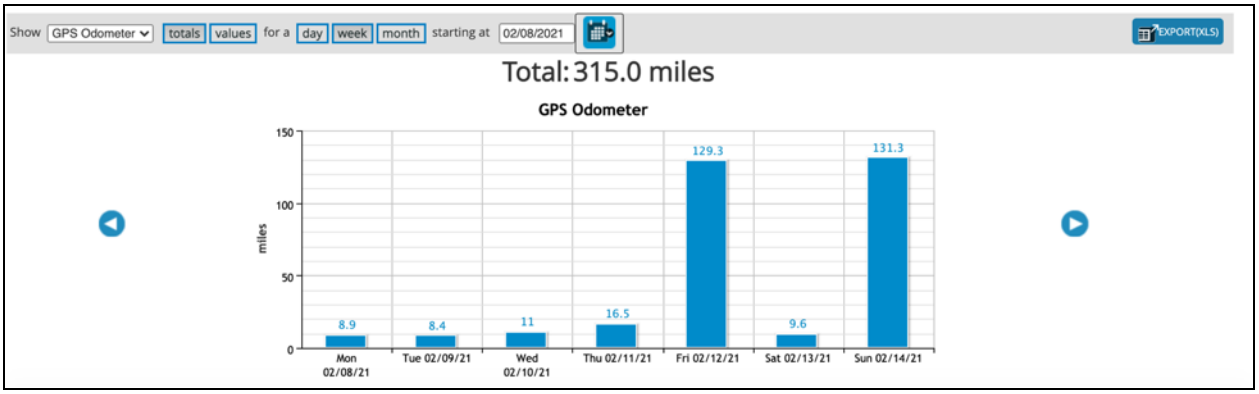


Telemetry

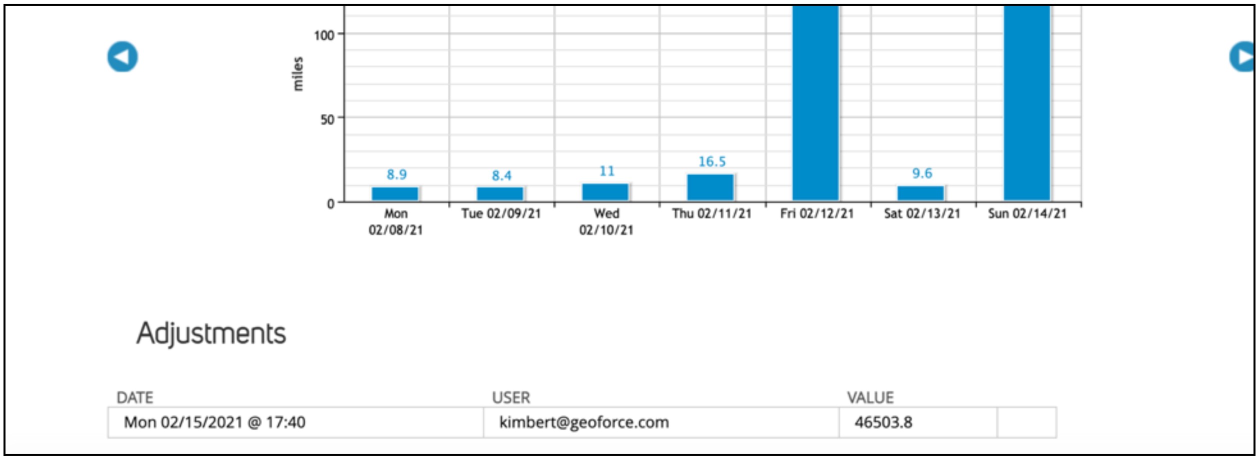
In this space, you can see an accumulation of this asset's Engine Run Time and GPS Odometer. At the top of the screen, you can use the drop-down menu to select what you would like to see, and choose the time frame you would like to see it in.



The graph will default to showing you the total hours run in a day, by the week. You can adjust that by selecting "day" "week" or "month". Additionally, you can change the graph to show values over time, as these values increase.



You will also be able to see any adjustments that have been made to telemetry, when, and by whom they were made. Adjustments can be made to the telemetry on the Summary tab. Lastly, you can export this information to an Excel spreadsheet by clicking "Export" on the right.



Compliance

Only available for customers who have enabled the Compliance add-on within their application. Contact Geoforce for more information.

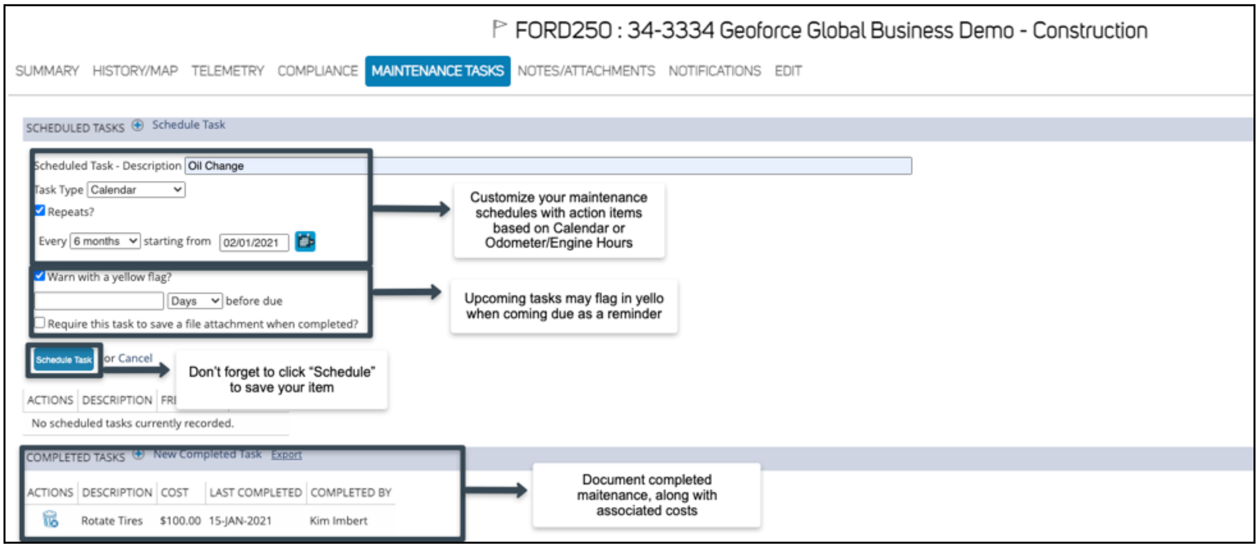
Maintenance Tasks

Depending on the type of device you have installed, you can utilize the system to help you keep track of the maintenance on your asset.

To start, click on "Schedule Task." From here, you can add a description of the kind of maintenance task you want to set up. Then select the Task Type.

- Calendar - Schedule your maintenance based on a calendar time frame (example - every 6 months).
- Engine Run Time - Schedule tasks based on hours your asset has run.
- GPS Odometer - Schedule task based on miles your asset has driven.

If you want this maintenance task to repeat on a regular basis (for example, every 5000 miles driven, or every 6 months) select “Repeats.” You can then select the frequency of the maintenance task. If this maintenance task will only happen once (for example, on a calendar date) then simply fill out when the task is due.



You can have the system “Warn with a yellow flag”, which means the flag on the asset will be yellow when the task is coming due.

Finally, you can have the system “Require this task to save a file attachment when completed.” This means that when someone comes through to complete the maintenance task, they must add a file attachment (pdf, jpg, etc.) like a work order in order for the task to be saved. When you are done with the configuration of your maintenance task, click “Schedule Task.” The flag color will turn green, and switch to yellow (if you have chosen that) and then red when the maintenance task is due. This space will also show you a countdown.

When the maintenance task is completed, click the blue check box icon to the left of the task. Then, fill out the corresponding information, and click “Complete Task.” The completed task will show up under “Completed Tasks” on the second half of the maintenance task page.

You can also add completed maintenance or "one-off" tasks in this space by clicking "New Completed Task" and filling out the corresponding information. This space is a great way to keep track of all of the maintenance done to your asset, not just the regularly scheduled tasks. You can always export the history of maintenance on your asset by selecting "Export" next to New Completed Task.

Notes/Attachments

In this tab, you can add any additional file or image attachments to the asset description page. This is a good space to keep pictures of your asset, and any work orders utilizing this asset. At the bottom of the page, there is a space to add notes.

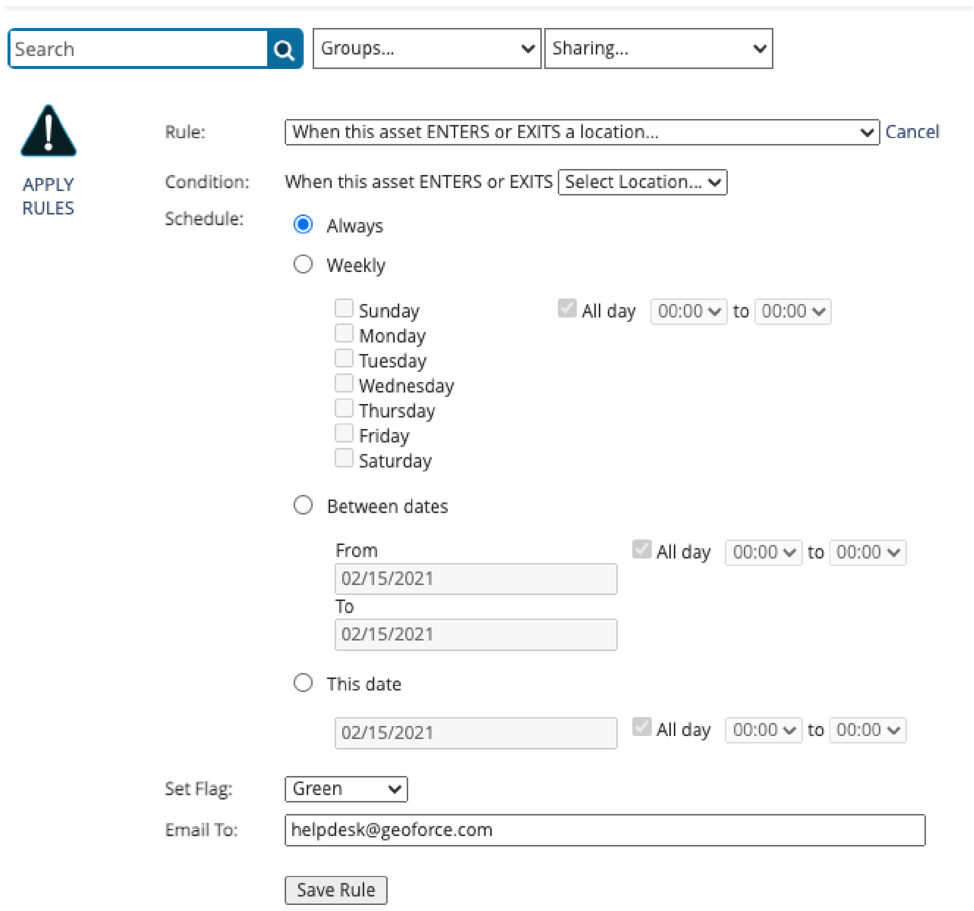
Notifications

There are multiple ways the system can notify you when something happens to your asset. One of those ways is through notifications. A notification will come to your email when the asset reports in at its scheduled time.

Creating Notifications for a Single Asset

1. Select "New Rule."

2. Choose the rule that best describes what you need from the drop-down menu.
3. Once selected, fill out the corresponding conditions for that rule. For example, some rules may be time dependent (if for instance, you want to know if your asset has moved on the weekends).
4. You can select a flag status to change, so that if the rule is broken or triggered, the flag will change color.
5. Add an email address that the system can send you an alert when triggered.** Then click “Save Rule.”

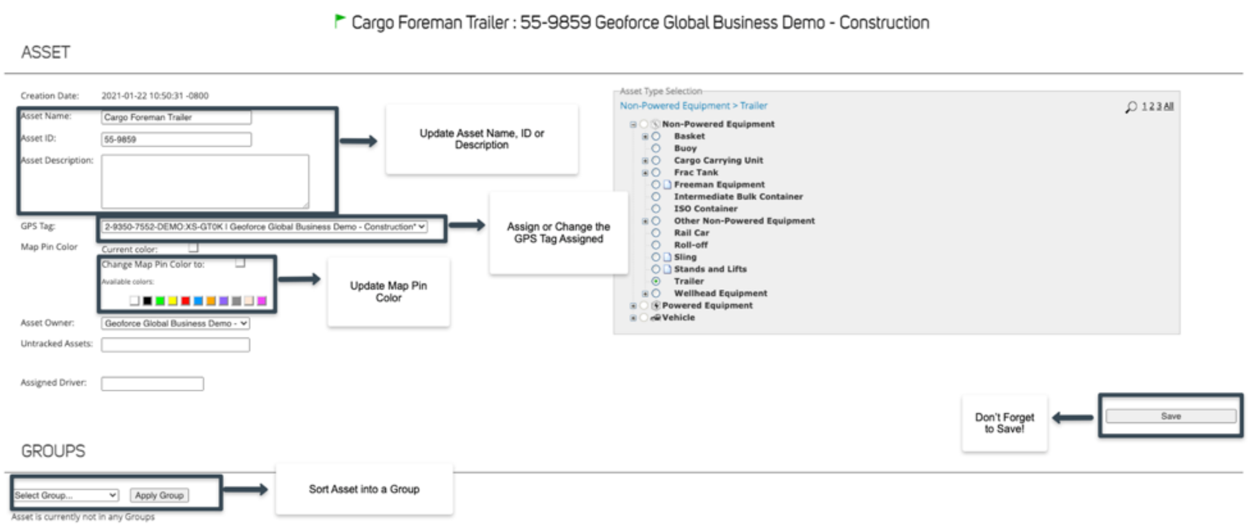


You can delete this notification/rule by selecting the garbage can on the left side of the rule. The rule cannot be edited, only deleted.

**You cannot set notifications to go to your phone as a text message. However, many cell phone carriers (Verizon, AT&T) have an option to create an “Email to text”. To find out how, type your cell phone carrier into Google and add “Email to text”. You will get an email address format (for example, “5555684574@vtext.com”) that you can then plug into the email field for notifications so that you get a text message. Please reach out to our helpdesk if you need any additional assistance.

Edit

The Edit tab is where you can make foundational changes to your asset. If your devices came shipped to you with the asset name and asset ID already listed as the device serial number, or if you just need to change your asset name or ID, you can alter those fields from here. This is also where you can add additional information into the “Asset Description” space, which will show up in the Summary Tab.



GPS Tag: This is the device serial number attached to this asset. You can change this serial number by using the drop-down menu and selecting another. If you do not find the serial number you were looking for in that drop down menu, that means it is currently in use on another asset. Remove it from that asset, or delete the asset, for the tag to be selectable again.

Map Pin Color: Depending on the sort of assets you are tracking, it can be helpful to have your assets divided by colors. This color will be the map pin color on the Map Screen.

Asset Type: You can select the asset type here that best matches what this device is installed on. Geoforce can add more asset types, if you do not see one that best fits your needs. Please contact helpdesk to have them add these types to your account.

Groups: Adding your asset to a group can help divide your assets correctly in reports, and in other views on the application. You can create groups in the Setup screen, and then add your assets to a group here in the Edit tab. Your asset can be in multiple groups.

*****WARNING***** At the very bottom of the screen, there is an option to delete your asset. If you do this, you will lose all of your assets' historical data. **Please note: Deleting your asset does not deactivate your device**. Please contact helpdesk to stop service on your Geoforce device if you need to.

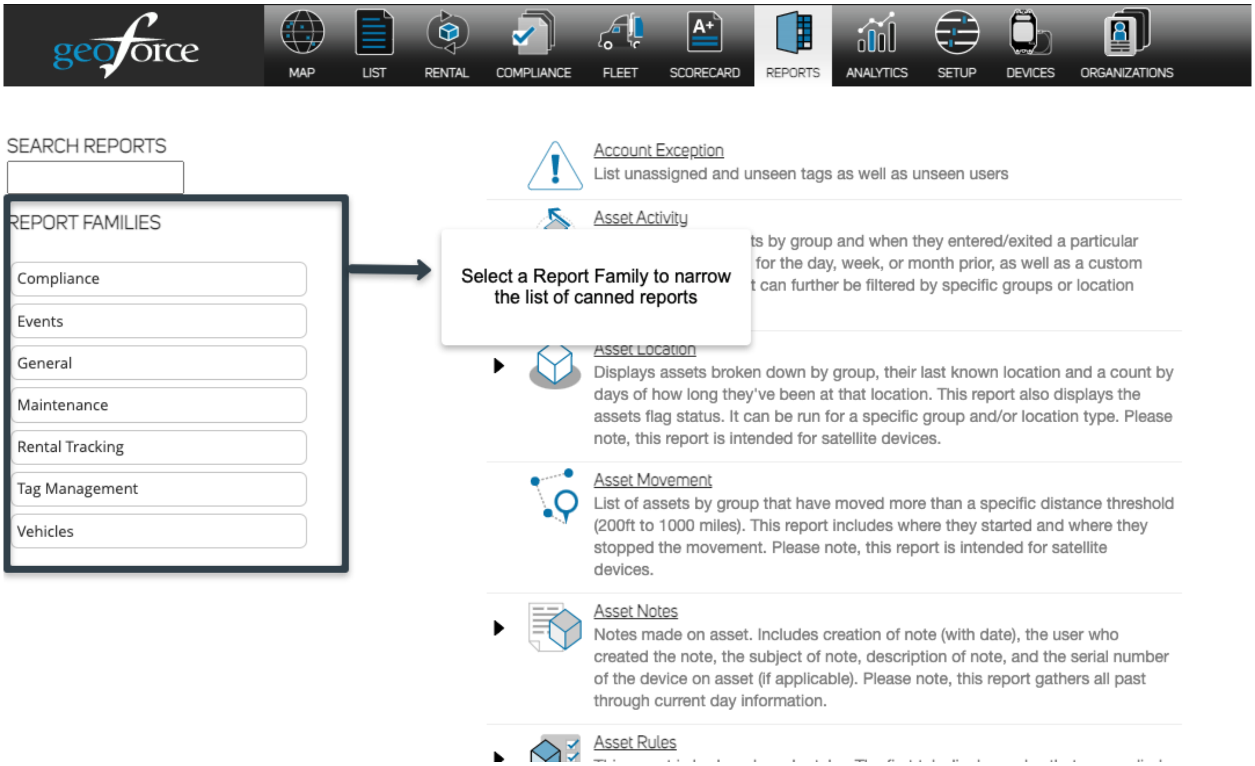
Reports

Geoforce offers a number of standard reports designed to help you with your day-to-day business. Any of these reports can be run from the application itself or scheduled to be run and sent to you on a regular basis.

Report Families

To narrow down what reports to use, you can click on an individual report family for reporting suggestions based on your needs:

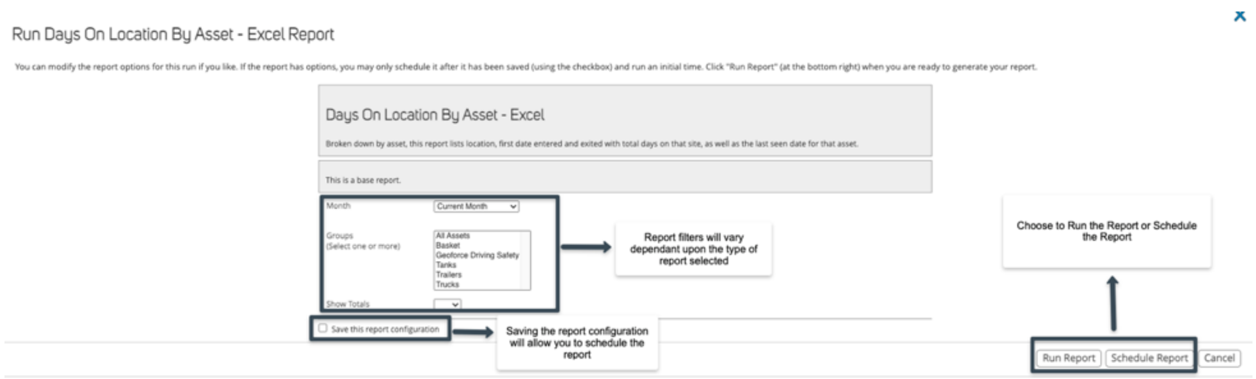
- Compliance - reports to display location activity.
- Events - reports showing events.
- General - most used reports for basic tracking of assets.
- Maintenance - reports used to keep track of maintenance tasks on your assets.
- Rental Tracking - reports best to use when keeping track of your rental assets.
- Tag Management - reports that show unassigned devices.
- Vehicles - these reports are specifically for data from tracking vehicles.



Running & Filtering Reports

To run a report, start by selecting the report that best fits your needs. Each report will have different configuration options. You can select groups, time frames, locations, etc. If you need to select multiple options, hold down the "Control" function on your keyboard, and use your mouse to select each option. Not selecting any specific report configuration will automatically include all options. Ex. – not selecting specific groups will include all groups in the report results.

Once you have the specific configuration for your report, click the "Run Report" button at the bottom of the screen.

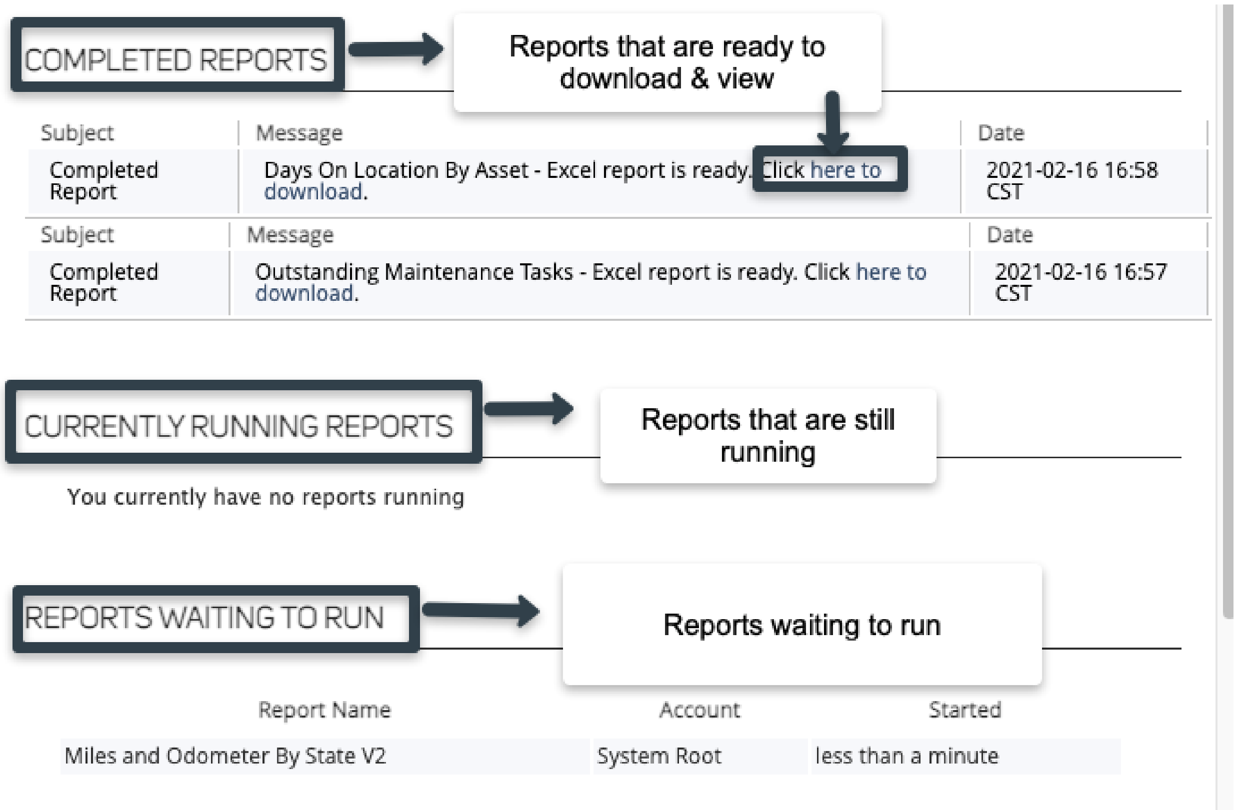


Report Que

On the far right, you can watch your report being processed

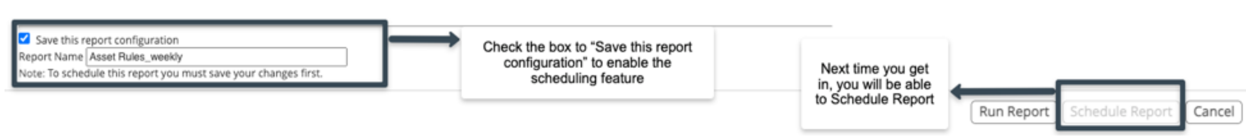
- Reports Waiting to Run: This is the report in the que.
- Currently Running Reports: Your report will show here when it's being run.
- Completed Reports: When your report has finished running, you will be able to select the excel spreadsheet in this space. Please note: the "Completed Reports" space will clear itself out in a day or two. There is no need to delete reports from this space.

*Quick Tip - getting out of the Report tab and back in, will move the reports through the que faster.



Scheduling Reports

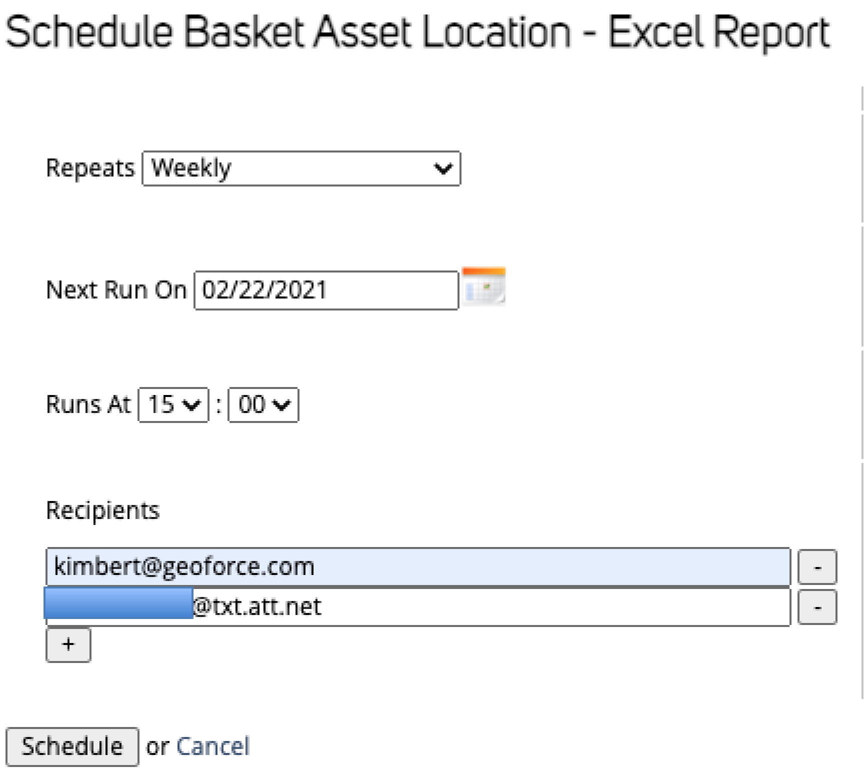
To schedule a report, click on the report itself. Fill out the steps above for "Running & Filtering Reports" but before you click "Run Report" instead, click the checkbox that says, "Save this report configuration." Give your report a name (for example, "Monthly Maintenance Report") and then select "Run Report."



From the main report screen, you will now see an arrow next to that report name. Clicking on it will reveal a drop down with your saved report. From your saved report, you can now select "Schedule Report."

- At the top of the screen, select "Schedule."
- Repeats: You can choose how often you want your report to come to you by selecting under the drop-down menu.

- Next Run On: Choose the date you would like to start to receive this report. For example, if you want to receive this report every month, please choose the first day of the next month.
- Runs At: Choose the time of day you want the report to run. We recommend running reports with more data during off hours.
- Recipients: Add email addresses which you want to receive this report. These email addresses do not necessarily need to be users in the system. To add multiple recipients, please make sure to add a comma and space between email addresses.



Report Summaries

Name of Report	Description	Report works with Cellular or Satellite or Both?
Account Counts	List of Tag types and number of assigned or unassigned	Both

	tag types. List of Asset types, tagged and untagged.	
Account Exception Report	List of unassigned tags, and list of tags and assets not seen in 30 days, and a list of users that haven't logged in in a while.	Both
Asset Activity	List of assets by group, and when they entered and exited a particular location. Can be run for the day, week or month before, or a custom date range and can be run for a specific group or location type.	Both
Asset Location	List of assets by group, their last known location and a count by days of how long they've been there. Also shows flag status. Can be run for a specific group and/or location type.	Satellite
Asset Location Based Utilization	List of assets by group showing percentage of time asset was in home yard vs outside of home yard ("time away").	Both
Asset Movement	List of assets by group that have moved a specific distance threshold (200ft to 1000 miles), includes where they started and where they stopped the movement.	Satellite
Asset Notes	Notes made on asset by asset. Includes creation of asset (with date), completed maintenance tasks. The notes are current - it's whatever is on the asset right now.	Both
Asset Rules	Tabbed report - first tab, rules that are applied to group by group. Second tab, rules that are applied to individual assets by asset. Third tab, assets without rules applied.	Both
Days on Location by Asset	By asset, lists location, first date entered and exited with total days on that site, and the last seen date for that asset.	Both
Days on Site	List of assets by group, how many days they were on a particular location.	Satellite
First Start Last Stop	Assets by group showing the first ignition (engine start) for the day, where that was, and the last stop, and where that was. List also of total hours vehicle was in use for that day	Cellular

Location Activity	Enter/exit report by location, listing all assets seen on that site and the date they were seen.	Cellular
Location Enter/Exit Counts	Enter exit count by location, listed by group.	Both
Location Inventory	Lists assets at each named location, and the date they were last seen.	Both
Miles and Odometer by State	Miles traveled by group of assets by asset per day. Also includes starting and ending ODO (GPS Odometer).	Cellular
Outstanding Maintenance Tasks	List of assets and their maintenance tasks with last seen location. Can be narrowed down by group or by flag status.	Both
Readiness Report	Last seen location and time for all assets, includes battery level and days since last seen.	Both
Speeding Events	Shows speeding events for cellular assets.	Cellular
Telemetry	By group, by asset shows by day telemetry data with a total at the end of the week.	Both
Telemetry Snapshot	Snapshot of telemetry from the day before or a custom date - report is dependent on what you want to look at, odometer, voltage, GPS accuracy, idle time, and in motion time.	Both
Top Speeders Report	Report by asset when the vehicle exceeds a set amount per hour. Can be changed per report.	Cellular

User Activity	Shows user logins.	Both
Vehicle Enter/Exit Activity Report	By Group, by asset shows when a vehicle entered or exited a location, and how long they were there.	Cellular

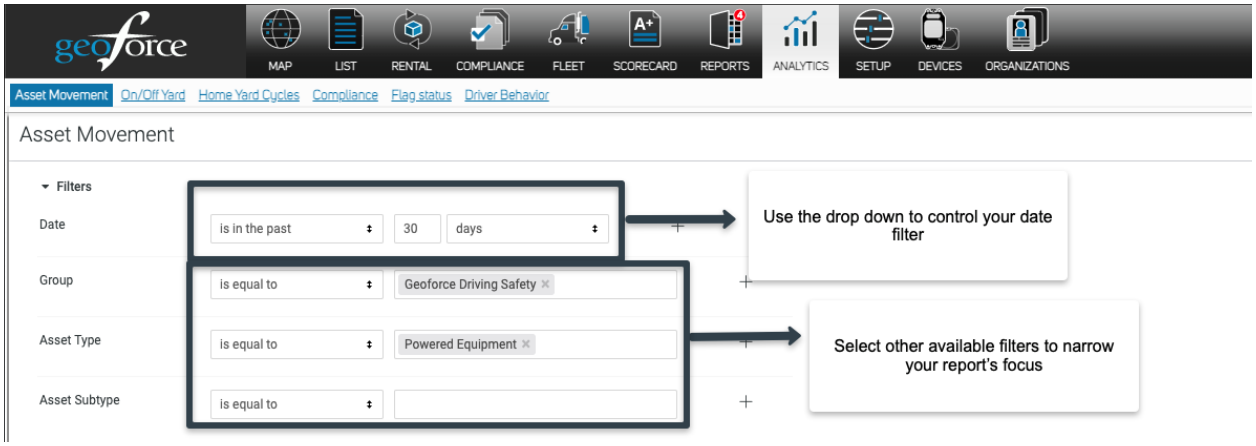
Analytics Dashboards

Dashboards enable you to have more visibility into your assets to help you plan confidently and cut costs, improve safety and increase efficiency by seeing long-term trends across your entire operation. If you do not see the Analytics Dashboard in your account, please contact Geoforce Helpdesk. This is not an add on, but a newer feature that may not be enabled yet.

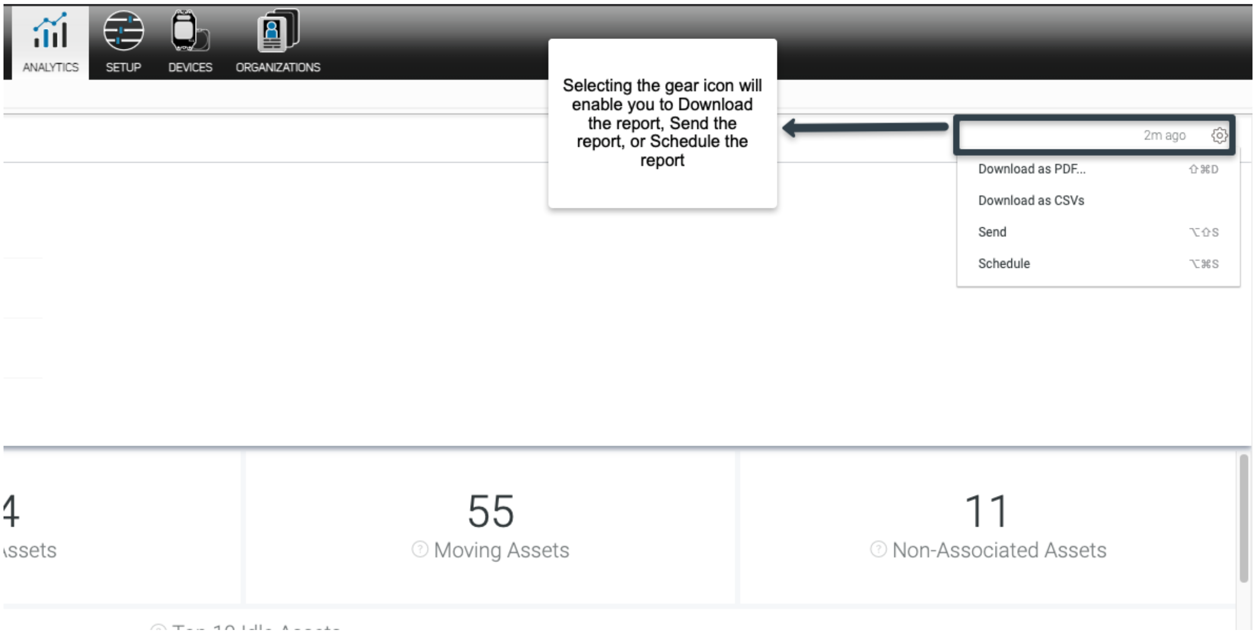
Dashboards include:

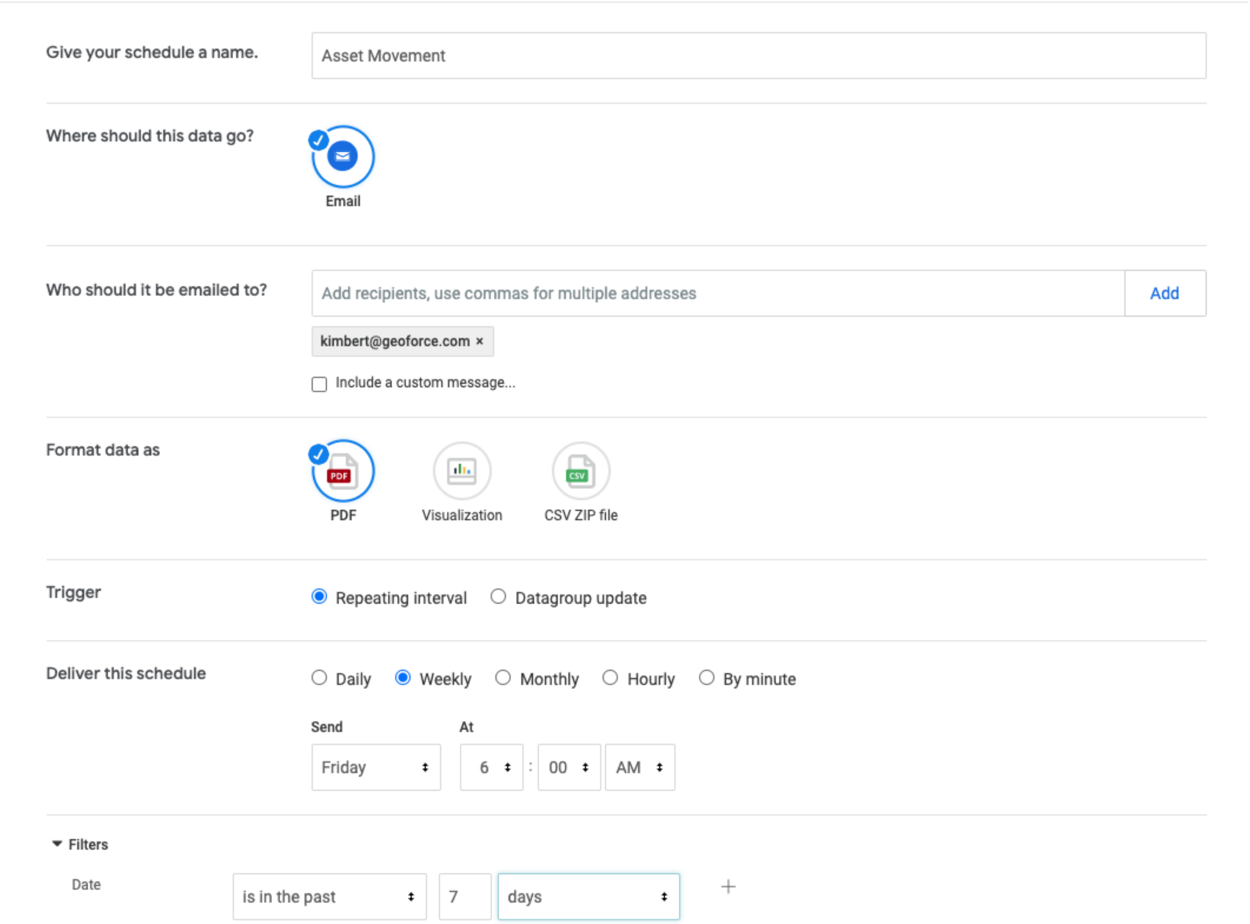
- Asset Movement
- On/Off Yard
- Home Yard Cycles
- Compliance
- Maintenance Flag Status
- Rental

Each Dashboard includes filters to filter by time, group, or asset type.



To Download a Dashboard, select the gear icon in the top right corner and select your preferred file type. You may also send a Dashboard to a colleague or schedule it to send to your email.

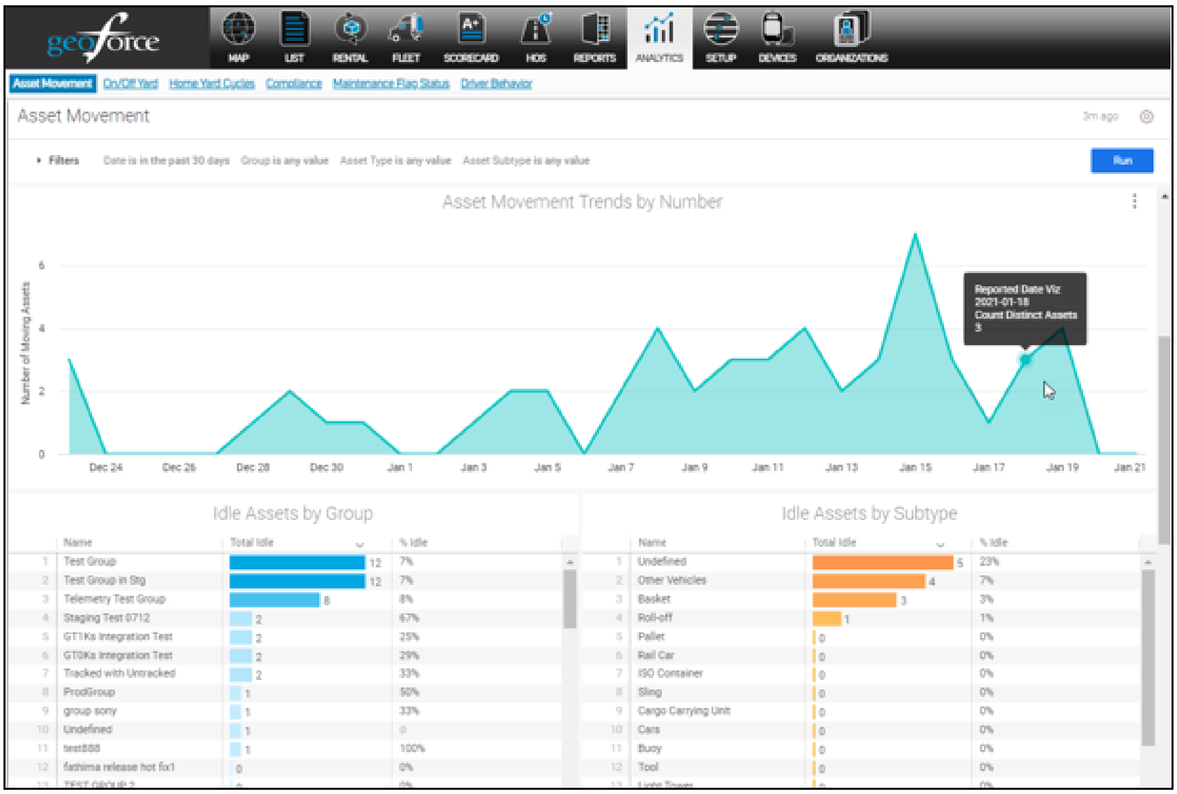




Asset Movement Dashboard

Provides you with an overview of which assets are moving, idling, or not reporting. This dashboard allows you to:

- Gain visibility into assets that are on the move.
- Identify the last location of assets that are not reporting.
- Locate idle assets and mobilize them to increase revenue.
- Hyperlink each asset to the Asset Detail Page for more detailed information.

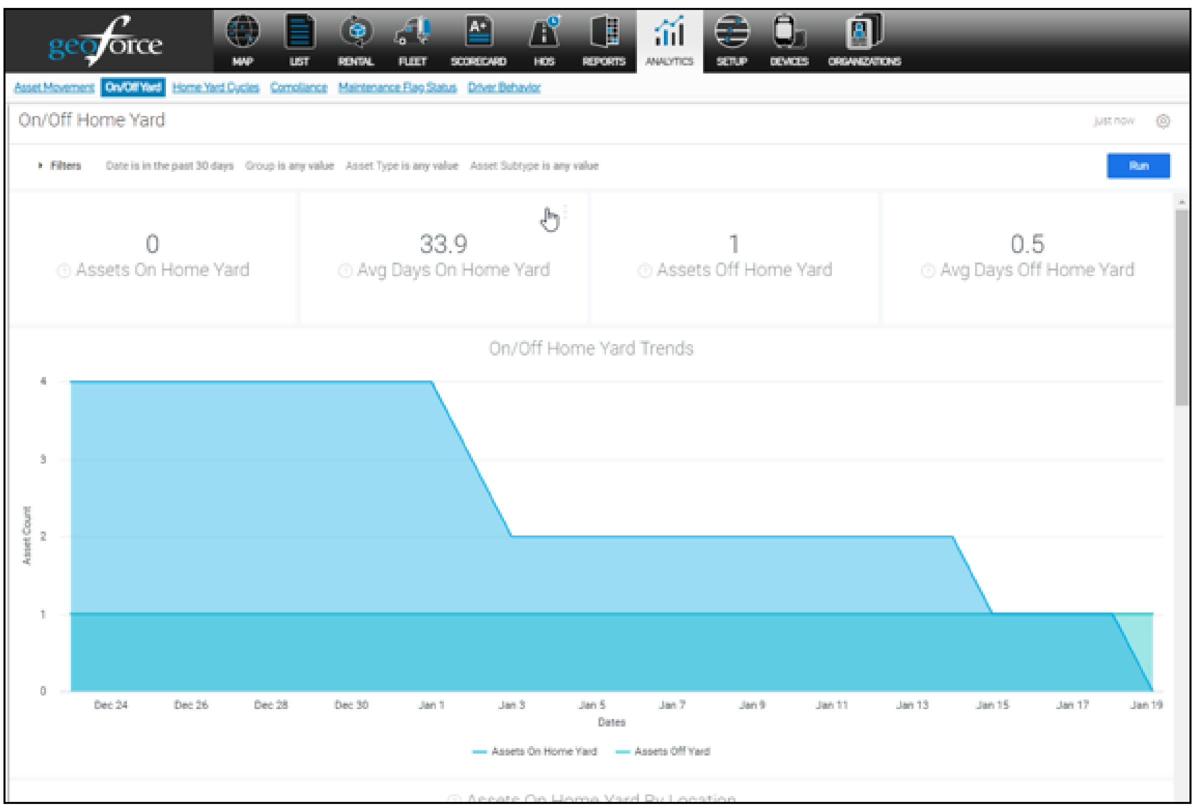


On/Off Yard Dashboard

This section allows you to quickly assess which assets are currently on-site or out in the field, giving you insight to increase asset utilization.

The trending analysis is also important for managing a fleet of assets and helps you identify and understand seasonal trends. This dashboard allows you to:

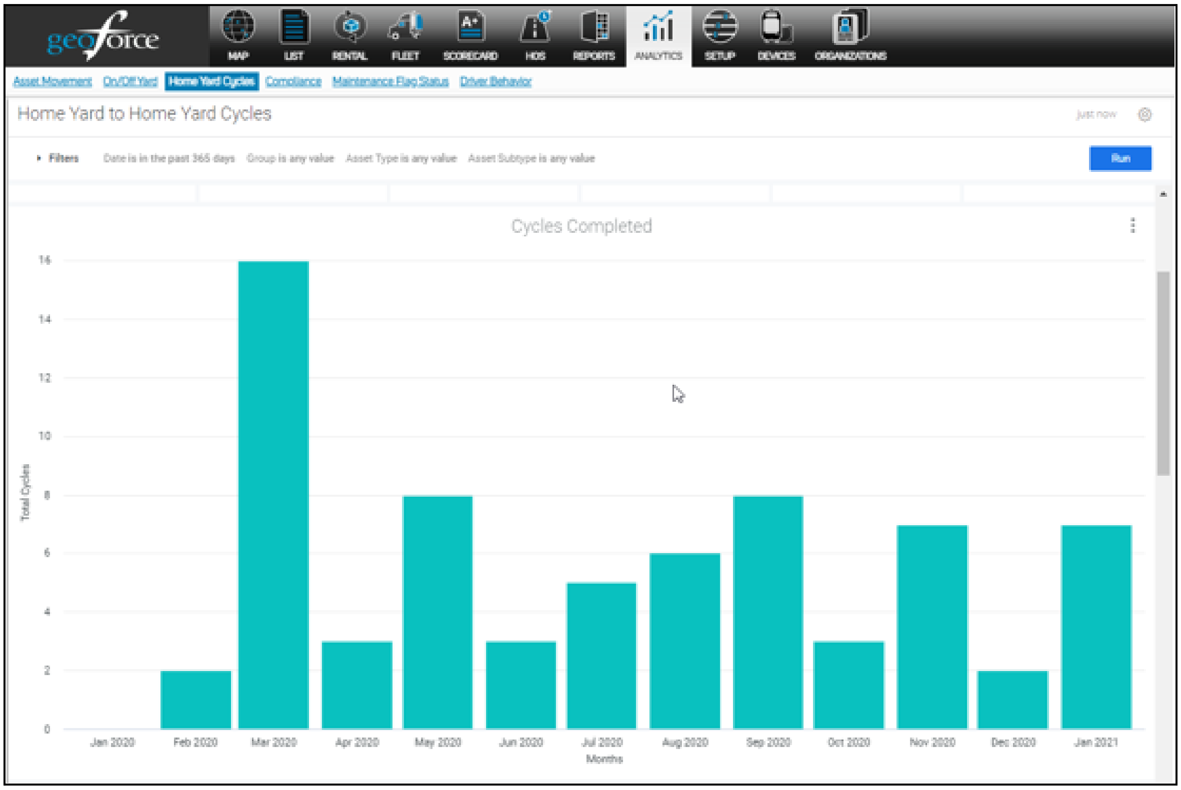
- See which assets are "on-yard" to plan for maintenance tasks.
- Ensure assets are always ready for use.
- Identify underperforming asset types on or off-yard in your inventory.
- Streamline asset utilization, reduce costs, and improve assets' overall performance.



Home Yard Cycles Dashboard

Provides understanding about the cycle of an asset leaving one home yard and returning to any other home yard. This dashboard allows you to:

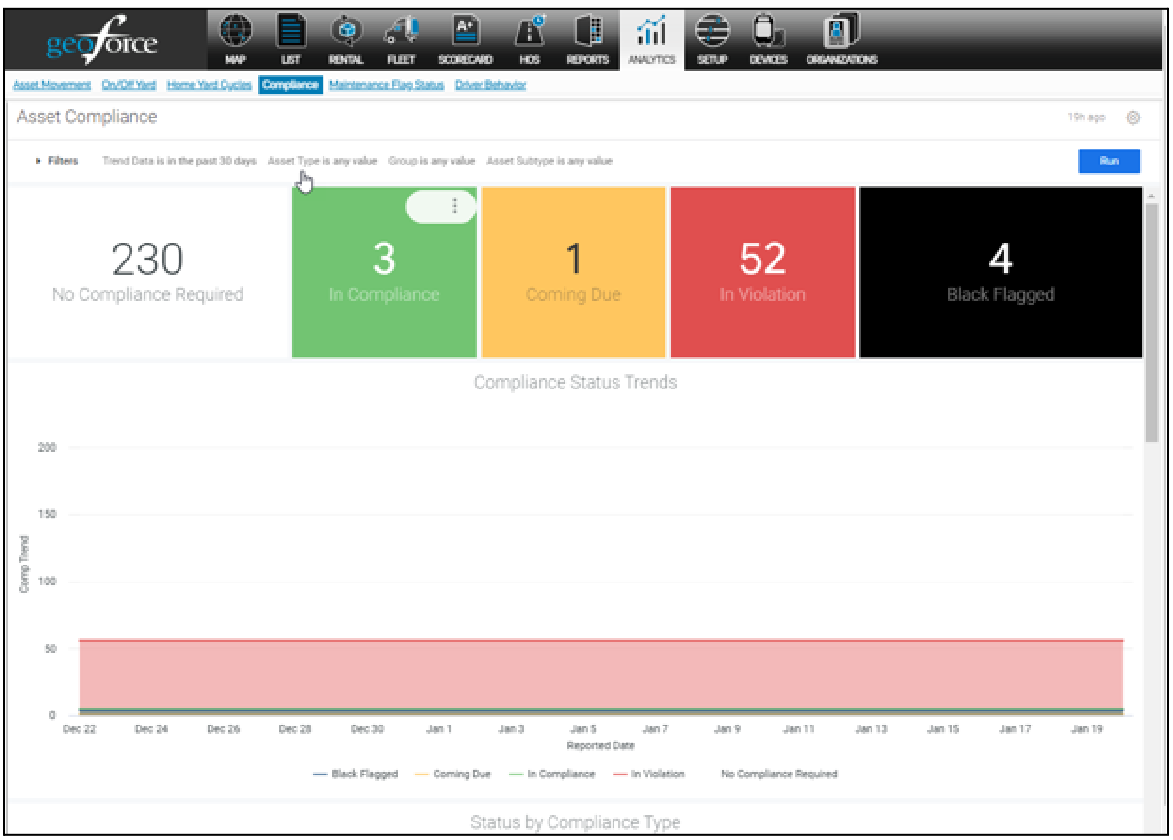
- Know how often and how long it takes assets to perform a cycle of work.
- Have insight into how well their inventory is performing.
- See trends of how these numbers relate to specific home yards as well as how long. assets spend at various points along the cycle.
- Uncover inefficiencies and help you optimize your operations.



*Compliance Dashboard

Compliance is a specialized add-on application available to Track and Trace customers that may need additional tracking and insight into the compliance and certifications of their assets. This dashboard provides you with:

- The ability to keep track of inspections and certifications that may be required based on legal or business needs.
- Additional information on the status of compliance for your inventory for both Untracked and Tracked Assets.
- Status of which of your assets may need attention now or in the near future
- The ability to see trends that will help you identify efficiencies to plan and always have equipment ready and compliant.

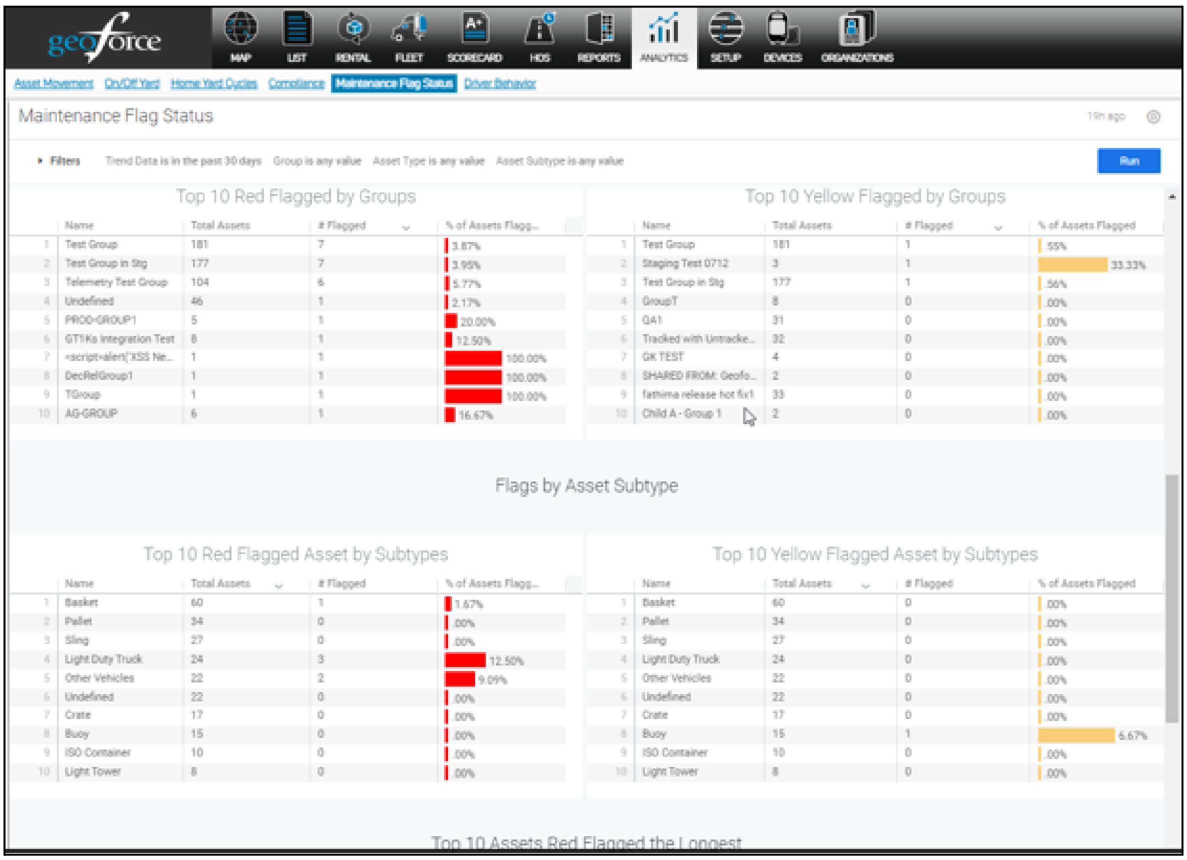


*Must have purchased the Compliance Model in order to use.

Maintenance Flag Status Dashboard

Flags aid users in understanding the status of assets based on user created rules. This dashboard will allow you to:

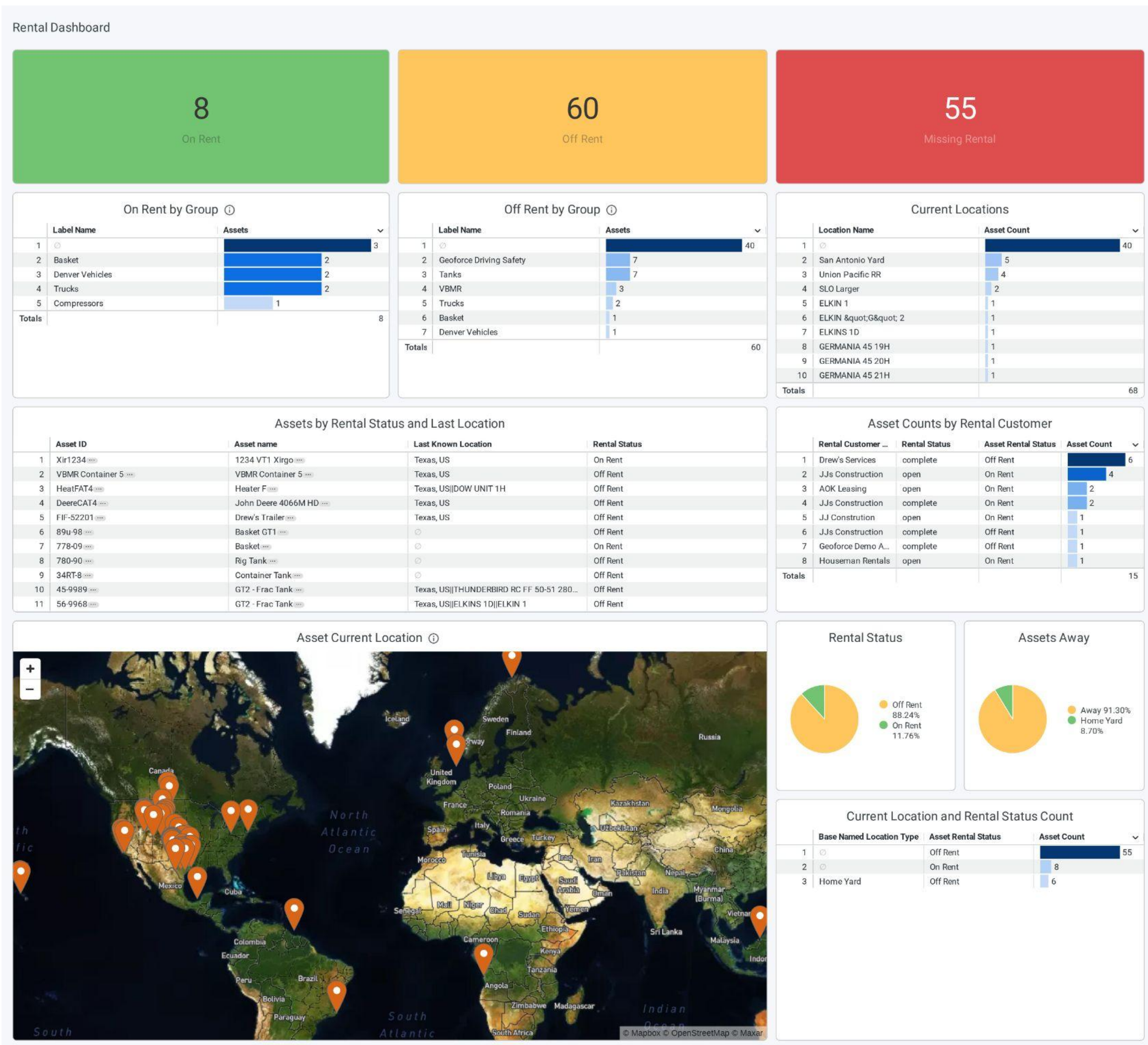
- See groups of assets and asset types and provide visibility to what assets need attention now or in the near future.
- Be able to see trends over time to gain insight into where efficiencies can be made in both internal processes and the type of assets that most often need attention.



*Rental Dashboard

If you are using either Embedded Rental or Integrated Rental, you will be able to see your rental data on this dashboard. This dashboard replaces manual rental tracking tools and processes by providing more accurate and efficient tracking capability.

- Easily see which of your assets are on or off rent, including by location and group.
- Improve your rental asset utilization and billing accuracy based on GPS location.



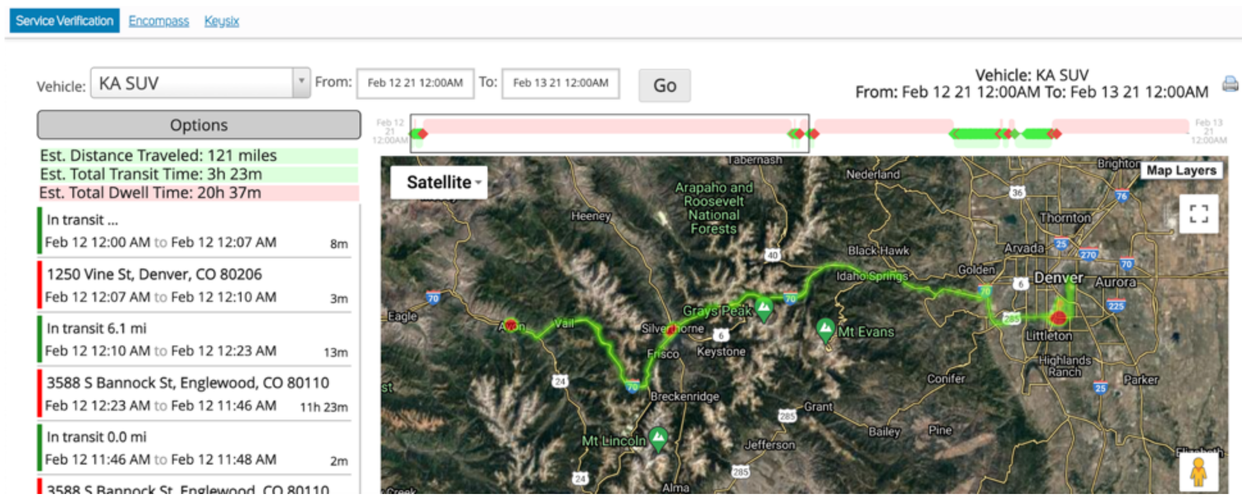
*Must have purchased the Rental in order to use. Please reference the “Rental” section of this user guide.

Fleet

The Fleet section of the application allows you to see a day in the life of your vehicle. **This part of Track and Trace can only be used by vehicle tracking devices.*

Service Verification

To start, use the search field to type the name of your vehicle. As you type, it should come available in the dropdown menu. Select your vehicle, and then select a 24-hour time frame to view the details of your vehicle's trips. Please note: this tab only allows you to view 24 hours of your vehicle's breadcrumbs at a time. Once you have chosen a time frame, select "Done" and then "Go."



On the left-hand side, you will see a summary of your vehicle's stops and transit times. You can double click on each section to see it highlighted on the map screen.

By scrolling along the top bar, you will be able to see the transit periods (highlighted in green) and the stops (highlighted in red).

At the top right-hand corner of the screen, you will see a printer icon. You can use this to export that day's data onto a PDF.

The Options Tab allows you to change what the system considers a "stop" to a bigger time frame. It also allows you to enable visibility to see other vehicles that may have been around the vehicle you were searching for.

Scorecard*

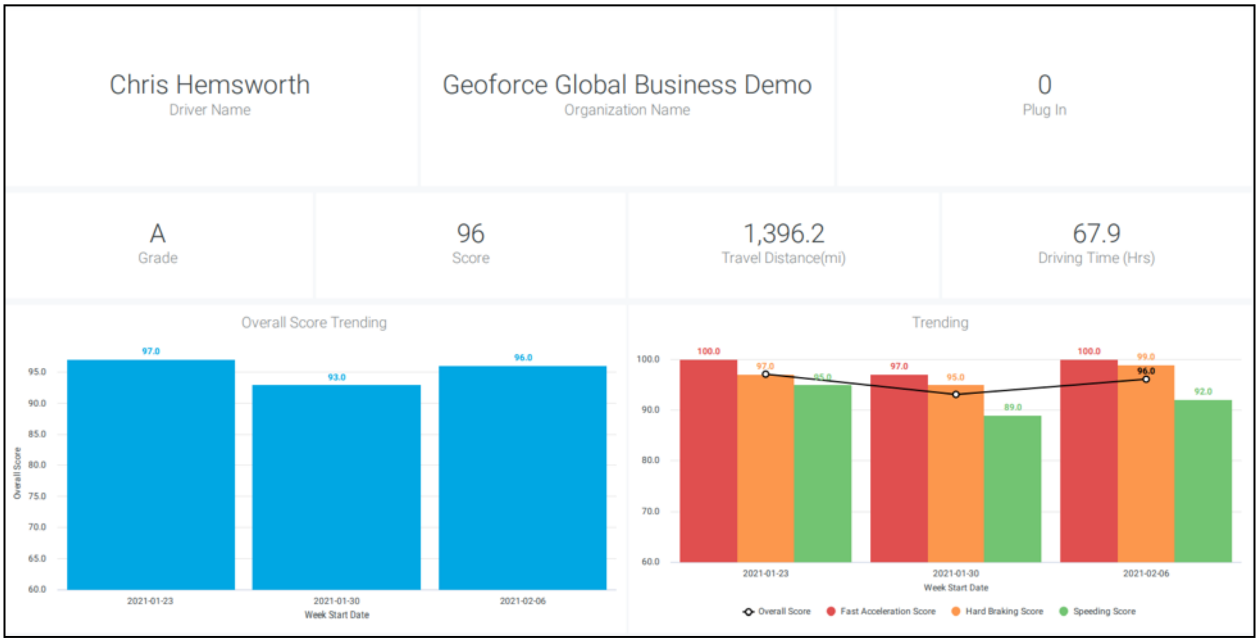
**Add on feature for vehicle GPS devices only. Contact Geoforce for more information.*

Scorecards enable organizations to identify risk and promote a positive safety culture. Scorecards are designed to provide Drivers and Supervisors a weekly snapshot that allows them to self-correct their riskiest behaviors, while recognizing areas they are already displaying safe driving.

Scorecards Types

Personal Scorecard

Personal Scorecards are for Drivers to receive their own weekly scoring metrics so they can quickly assess their strengths and areas needing improvement for the driving week. These scorecards will show the personal driver's scorecard information such as overall driving trends, Speeding, hard braking, fast acceleration, idling, etc. These driver scorecards are automatically sent to drivers every Monday.



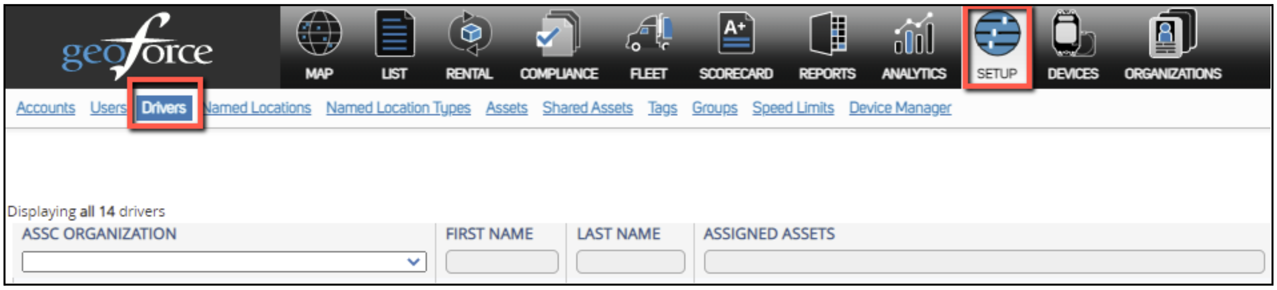
Organization Scorecard

Organization Scorecards are for Supervisors, Managers, or other corporate-level staff who need to manage a team of drivers. These types of scorecards will show the drivers under the account or organization. These are scheduled to be sent to each account using the scorecard scheduling feature. Supervisors may use Organizational Scorecards to manage their fleet driving safety, analyzing their top performance and identifying driver's needs for coaching.

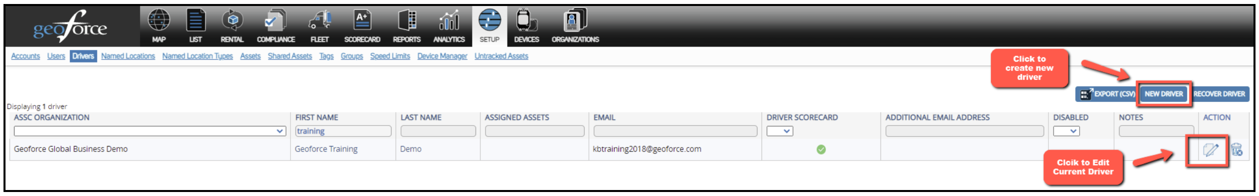
Enabling Driver & Supervisor Scorecards

Setting up Driver Scorecards

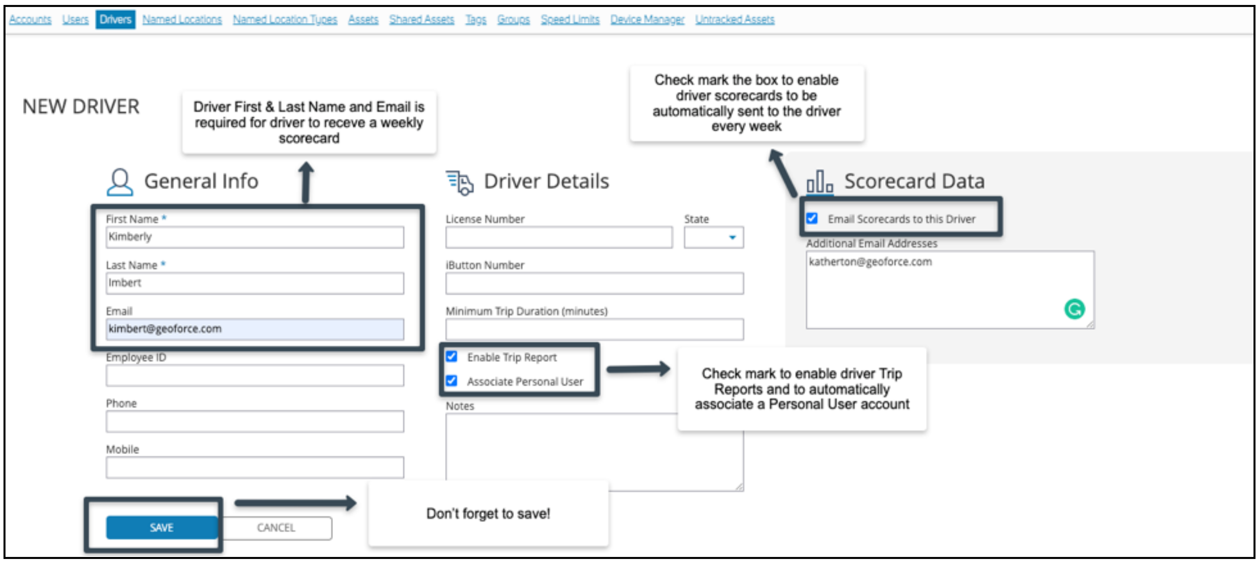
1. Navigate to the Setup Tab and select "Drivers" tab.



2. Select an existing driver you wish to enable scorecards for or select "New Driver" to create a new driver to enable a scorecard.



3. Under the “Scorecard Data” panel, checkmark the box to “Email scorecards to this driver”.
4. Make sure the driver has an email listed under the Email field.
5. If you wish to add a supervisor to receive the individual driver scorecard, add their email to the “Additional Emails” box.
6. Don’t forget to click Save.



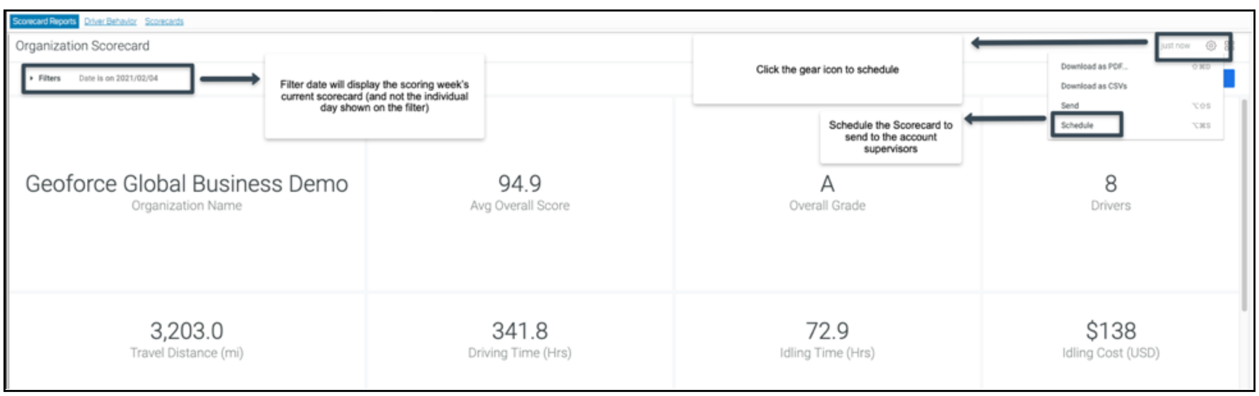
Setting up Organization Scorecards

When Scorecards are enabled for an organization, these will automatically generate under the Scorecard Tab for Users that have the appropriate access.

Note - Organization Scorecards apply to the entire account. If you wish to generate organization scorecards for child accounts or Subaccounts, you will need to schedule each organization scorecard under each child account. Currently, scorecards cannot be filtered by group.

Scheduling Organization Scorecards

1. Navigate to the Scorecard tab.
2. Click “Scorecards Reports.”
3. Select Organization Scorecard from the left panel.
4. Click the gear icon in the top right corner.
5. Select Schedule.
6. Add email recipients (including yourself if you do not see your email listed already).
7. Adjust additional filters such as Report Format (PDF, Visualization, CSV) and Delivery Schedule.
8. **Important!** Under filters, select the current account you are working in under the section labeled “Organization Name.” If you do not select the organization filter, the scorecards will be sent with the same account information.
9. Under Advanced Options, check the box to “Expand tables” to ensure the entire scorecard is sent instead of a cropped version.
10. Click “Save All” to save your scheduled report.
11. Repeat steps above for every Sub Account that you want to schedule for.
12. Once you are in the scheduling window, click “New” on the left-hand panel to set a new schedule. If you do not click “New” you will continue to edit your previous schedules.
13. Click “Save All” to save your scheduled report.



Scorecard Reports

Driver and Organization Scorecards can be viewed by navigating to the Scorecard Tab > Scorecard Reports. You may also find other trending scoring analytics under this section.

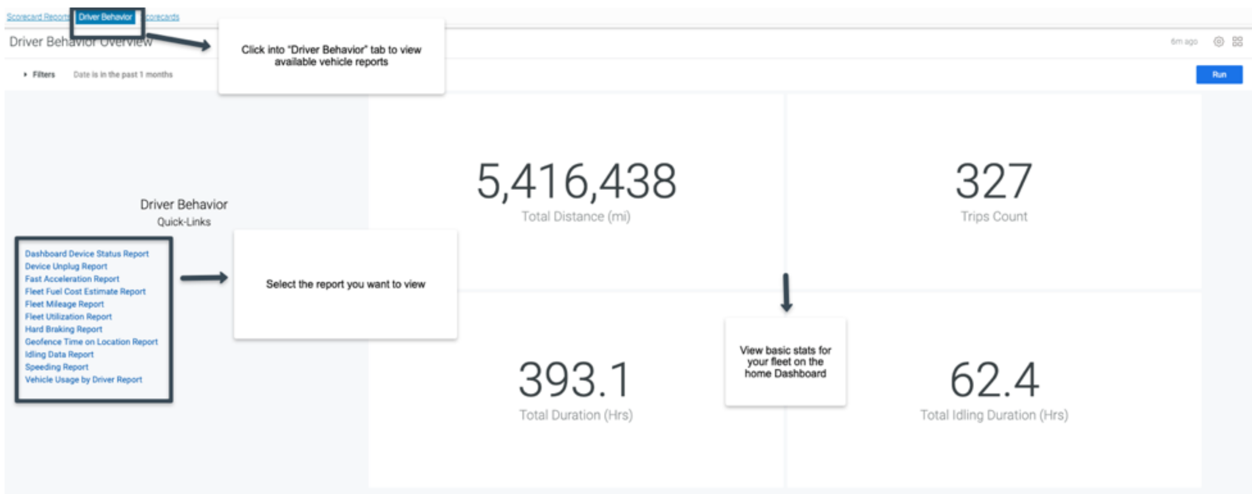
View Download or Schedule by clicking the gear icon in the top right corner and selecting your preference.

- Analytics
- Analytics - Driver Trending
- Analytics Overall Score Trending - Groups
- Analytics Overall Score Trending - Driver
- Top 5 Drivers by Distance
- Top 5 Drivers by Score
- Multi-Driver Utilization Report

Driver Behavior Reports

In addition to Scorecard Reports, you may find a number of driver behavior reports under the Scorecard Tab. These include driving behavior such as Speeding or Hard Braking but also include Fleet reports for Mileage, Idling, and Device Unplugs.

All reports may be downloaded as a PDF or CSV, sent to a recipient, or scheduled by clicking the gear icon on the top right corner and selecting which option you want.



The full list of vehicle behavior reports is below:

- Dashboard Device Status Report
- Device Unplug Report
- Fast Acceleration Report
- Fleet Fuel Cost Estimate Report
- Fleet Mileage Report
- Fleet Utilization Report

- Hard Braking Report
- Geofence Time on Location Report
- Idling Data Report
- Speeding Report
- Vehicle Usage by Driver Report

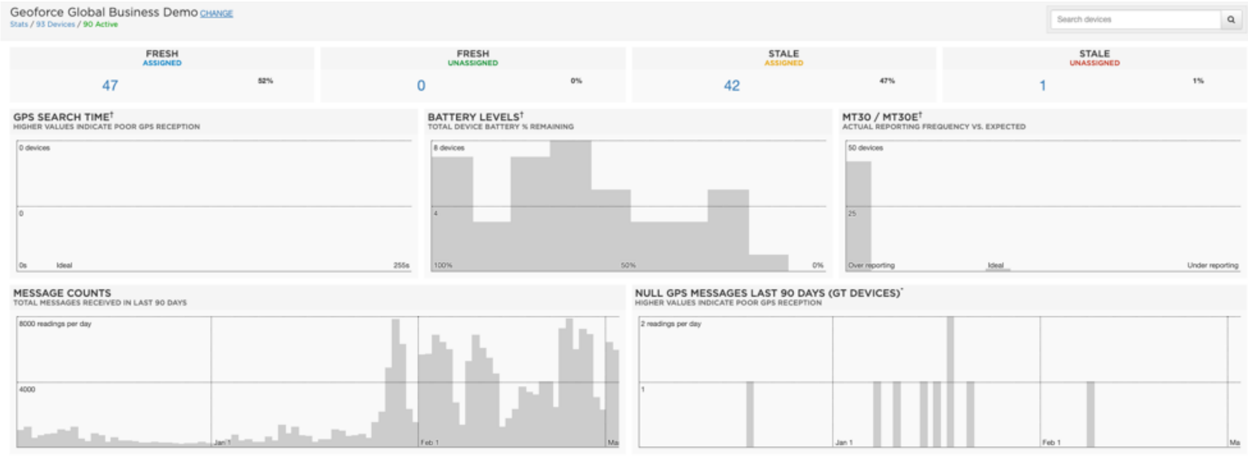
Device Manager

Device Manager has been designed to allow you to see a more granular view of your devices, their reporting profiles and their overall health. Please note: this section only gives readings for satellite trackers and will not work for cellular devices. Device Manager is enabled for customers by request only. If you are interested, contact Geoforce.

Devices Dashboard

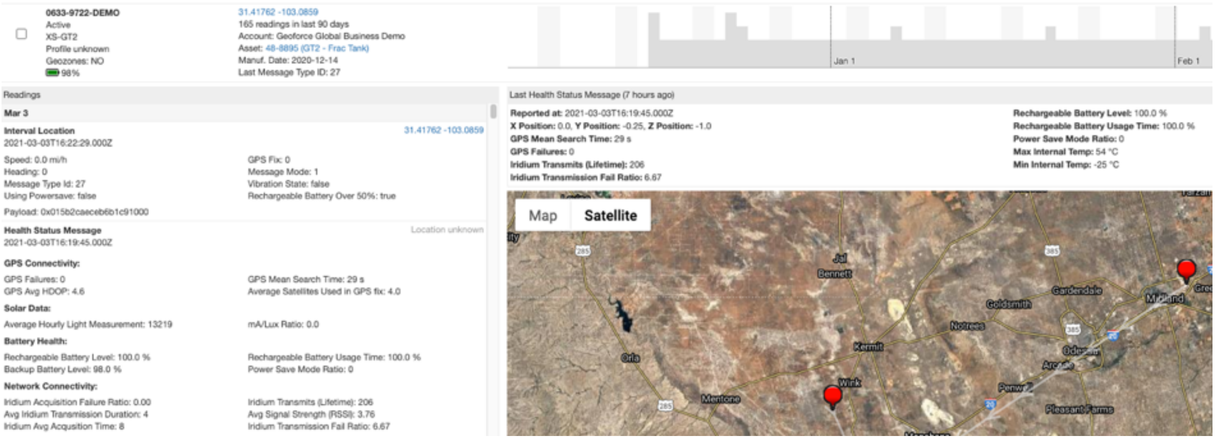
This screen allows you to see your devices divided into three categories:

- Fresh Assigned: Devices that are assigned (have an asset name/ID) and are reporting.
- Fresh Unassigned: Devices that are reporting, but do not have an asset name & ID.
- Stale Assigned: Devices that are assigned but have not reported in 30+ days.
- Stale Unassigned: Devices that are not assigned and are not reporting - likely uninstalled.



To the devices within these categories, click on the number of devices listed to take you to that screen. From here you will find more information about your devices, including:

- Battery Life
- Current Locations (in Lat/Long)
- Number of Readings in the last 90 Days



By scrolling your mouse along the bar on the right side of the screen, you can see how many readings the device received per day. If you consistently see dates missing readings (showing less readings per day than the device is scheduled to report) it could indicate that your device was installed incorrectly and is unable to see the sky.

On the far left, you can use the filtering fields to narrow down the device list. On the top right corner, you can search for a specific device.

By clicking on the ESN of the device, you will be taken to a new screen that will show you more in-depth readings for that device, including the last health status message.

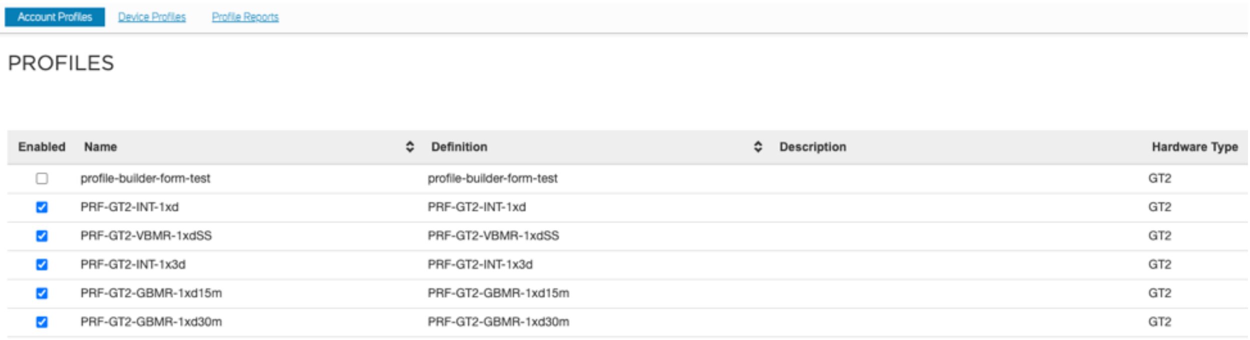
Please note for GT2 devices:
This page is full of information but the most important part to note here is the rechargeable battery level, which will show you the current status of your solar powered battery. If this battery is not getting enough sun to recharge, the device may go into “Power Save Mode” which reverts the reporting rate back down to twice a day until it receives enough sunlight to charge and will revert back to it’s scheduled reporting times.

Profiles

This section allows you to manipulate the reporting profiles on your GT2 device.

Account Profiles

This screen will show you the available reporting profiles that have been added to your customer account.



Account Profiles Device Profiles Profile Reports

PROFILES

Enabled	Name	Definition	Description	Hardware Type
☐	profile-builder-form-test	profile-builder-form-test		GT2
☑	PRF-GT2-INT-1xd	PRF-GT2-INT-1xd		GT2
☑	PRF-GT2-VBMR-1xdSS	PRF-GT2-VBMR-1xdSS		GT2
☑	PRF-GT2-INT-1x3d	PRF-GT2-INT-1x3d		GT2
☑	PRF-GT2-GBMR-1xd15m	PRF-GT2-GBMR-1xd15m		GT2
☑	PRF-GT2-GBMR-1xd30m	PRF-GT2-GBMR-1xd30m		GT2

Within this section, you will be able to create new reporting profiles for your GT2 devices. To start, click create on the far right. Add a Name for your reporting profile, then use the drop-down menu to select the following reporting types:

- Daily Intervals: Set up device to report at a specific daily interval and/or at specific times of day/night.
- Daily Intervals & Vibration Events: Daily interval reporting, plus device will report upon vibration. (Recommended for equipment like welders, air compressors.)
- Daily Intervals & GPS Motion Events: Daily interval reporting, plus reporting more frequently when asset is in transit.

Daily Intervals

Use the drop-down menu to select the reporting frequency, up to 12 times per day. If you select up to 8 times per day, you will get an option to specify reporting times. Clicking the button to the right will allow you to customize transmission times. You can either click inside the box to change the time manually or click the clock on the right to select a time. At the bottom, select the time zone this asset will be in. On the right side of the screen, you can select to keep your asset in Power Save mode, which reverts the reporting rate back down to twice a day until it receives enough sunlight to charge and will revert to its scheduled reporting times.

Daily Interval & Vibration Events

You will receive the same options as Daily Intervals only, but on the right side you will now have the option to select "Send reports when asset starts and stops vibrating".

Daily Interval & GPS Motion Events

Selecting this option will allow you to still select a daily interval time frame, but you will not be able to specify reporting times. On the right, you can select to have the device check every 15 or 30 minutes if the device is in motion. If motion is detected, then you can select the reporting frequency.

All Profiles

For all profiles, you can select to keep your asset in Power Save mode, which reverts the reporting rate back down to twice a day until it receives enough sunlight to charge and will revert to its scheduled reporting times. When you are done, click "Next". This screen will show you the full report configuration. If everything looks right, then click Save. This reporting profile will now show up under device profiles.

Device Profiles

From here, you can see what reporting profiles your devices currently have. To make a change to your device reporting profile:

- Add the ESN of the device into the ESN field.
- On the far-right drop-down menu, select the correct profile you want to deploy.
- Click update.
- The next time your device reports, it will read and download it's new reporting profile, and start reporting at that rate from there.

PLEASE NOTE: *Changing your reporting profile may increase or decrease the amount of data your device use. Using a higher frequency reporting rate may require a higher data subscription rate, or else be subject to overage charges. Normally a change in profile will require a quote from Geoforce.*

Profile Reports

This screen will show you the status of your updated profile, if it has been successfully deployed yet or not.

Compliance

**Compliance requires a one-time setup fee. Please contact Geoforce if you are interested in using Compliance for your organization. This normally requires a quote from Geoforce before we can set up your Compliance account.*

Compliance allows companies to identify, track, and maintain equipment certifications proactively.

Getting Started with Compliance

Step One: Add Geoforce Compliance to your Geoforce Product Suite
Geoforce Compliance is a separate product that, once enabled, appears as a seamless part of the overall Geoforce product suite under the "Compliance" tab. As an existing customer, you can contact helpdesk@geoforce.com to enable the Geoforce Compliance product.

Step Two: Grant Users Roles and Permissions w/in Geoforce Compliance
The compliance function within an organization often brings new users to the Geoforce Product Suite but not all of those new users want or need access to the full functionality of Geoforce. For this reason, roles and permissions within the Geoforce Compliance product are entirely separate from roles and permissions for the rest of the Geoforce Product Suite.

Step Three: Define a Compliance Policy
A Compliance Policy is a collection of rules that define the compliance requirements for your equipment.

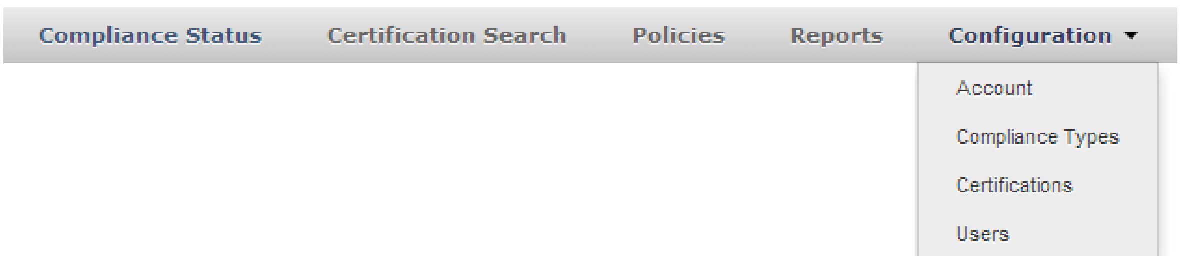
Step Four: Upload your Compliance Documentation
You will want to use your current asset certifications and apply them to your assets as you define your policies so your data will be up to date.

Step Five: Manage Your Assets in Compliance
At this stage you've got your assets shared with Geoforce Compliance, you've got a compliance policy defined, and you've got Compliance Technicians uploading existing certification documents to bring Geoforce Compliance fully up to date.

Your next step is to share what you've got with two important users — your Compliance Manager and with Operations personnel. These users should be the ones to keep up with current certifications and schedule assets which are due or in violation.

Compliance Users Overview

Users in the Compliance Administrator role can access the User Setup and Configuration functions by clicking on "Configuration" and then "Users":



Once on this page, a Compliance Administrator can see:

1. A list of existing users and their currently assigned role.
2. An "Edit" action for existing users.
3. An "Add new user" button for creating new Compliance users.
4. A list of definitions for the different roles available in the Compliance product.

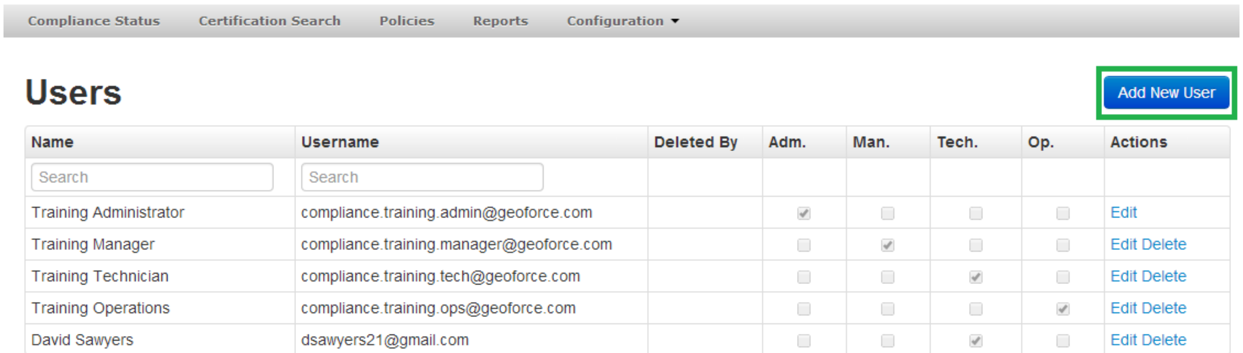
Compliance Users

Compliance Users are simply users of the Geoforce Product Suite that have been granted permission to access the Compliance product.

If a user exists in the Geoforce Product Suite with, for example, the username "test@geoforce.net", then a Compliance Administrator can grant that user access to the Compliance product by adding a user with the username "test@geoforce.net" and assigning that user a Compliance Role.

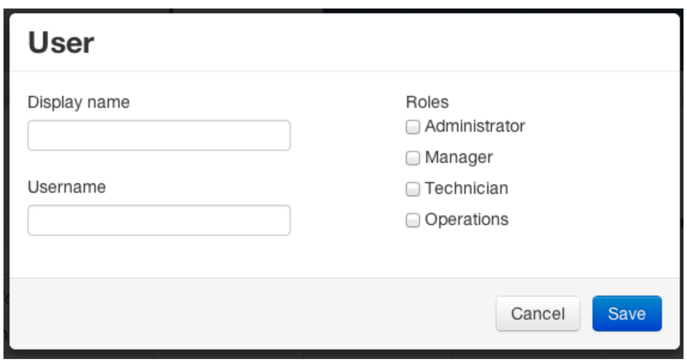
Add a New Compliance User

As a Compliance Administrator, click the "Add New User" button on the Users page:



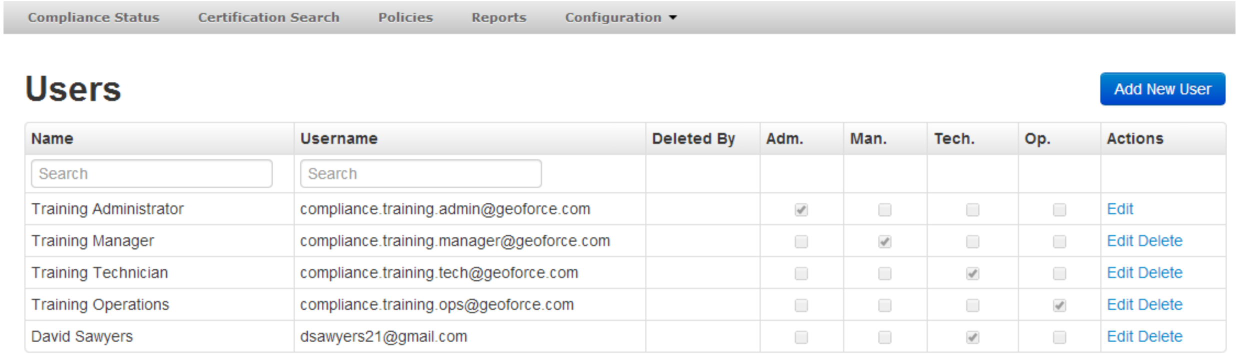
Name	Username	Deleted By	Adm.	Man.	Tech.	Op.	Actions
Search	Search						
Training Administrator	compliance.training.admin@geoforce.com		✓				Edit
Training Manager	compliance.training.manager@geoforce.com			✓			Edit Delete
Training Technician	compliance.training.tech@geoforce.com				✓		Edit Delete
Training Operations	compliance.training.ops@geoforce.com					✓	Edit Delete
David Sawyers	dsawyers21@gmail.com				✓		Edit Delete

Enter the Full Name as the "Display Name" and email address as the "Username" of the new Compliance User and select a Compliance Role. (NOTE: the username must match the email address of an existing Geoforce Product Suite user.)



View Existing Compliance Users

A list of existing Compliance Users for a Compliance Account is displayed on the Configuration / Users page:



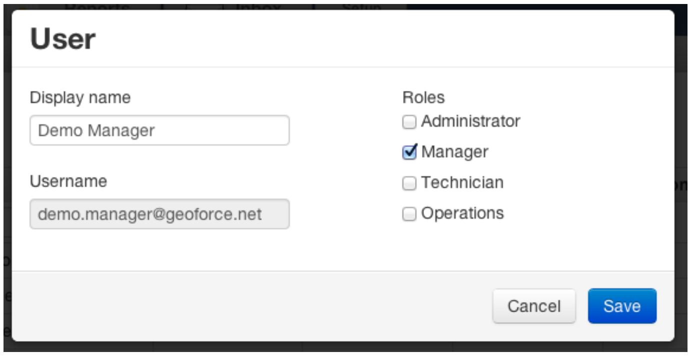
Name	Username	Deleted By	Adm.	Man.	Tech.	Op.	Actions
Search	Search						
Training Administrator	compliance.training.admin@geoforce.com		☑	☐	☐	☐	Edit
Training Manager	compliance.training.manager@geoforce.com		☐	☑	☐	☐	Edit Delete
Training Technician	compliance.training.tech@geoforce.com		☐	☐	☑	☐	Edit Delete
Training Operations	compliance.training.ops@geoforce.com		☐	☐	☐	☑	Edit Delete
David Sawyers	dsawyers21@gmail.com		☐	☐	☑	☐	Edit Delete

On this page you can see each user and their role(s). On the bottom of the Compliance Users page is the breakdown of each Compliance Role and their permission breakdown.

Role	Description
Administrator	Define compliance policies and configure application settings
Manager	View asset status
Technician	View asset status and upload new certificates
Operations	Read-only access to assets and their compliance status and documentation

Edit a User and its Roles

To change the display name or roles for a user simply click the "Edit" button on the right-hand side of the list:



Note that the "Username" (email address) cannot be edited once a user has been created.

Compliance Policies

A Compliance Policy is a collection of rules that define the compliance requirements for your equipment. Asset type by asset type. For example, you may have a requirement that offshore baskets of any kind require a lift test every two years.

Compliance Rules in Three Parts:

1. The Asset Type, in this example, is an “offshore basket”.
2. The Certification that is required, in this example, is a “lift test”.
3. The Validity or Renewal Period, in this example, is every two years (validity can be set to “permanent” as well).

Your Compliance Policy is simply all the Compliance Rules you have defined for your equipment at any given time.

Compliance Administrators and only Compliance Administrators are able to define Compliance Rules and add them to a Compliance Policy.

Creating Compliance Policies

Compliance Administrators (and only Compliance Administrators) have the ability to create and manage Compliance Policies.

Active Compliance Policies

A Compliance Policy is all of the Compliance Rules you have defined across all Compliance Types. For this reason, there is only ever one single, global Compliance Policy that is in effect or “Active” at any given time. That Active Policy is the total of the compliance requirements you want in force right now.

As with anything, rules and requirements come and go or require tweaking. Compliance Administrators need to be able to handle those changes smoothly and efficiently. The Compliance Policy allows a Compliance Administrator to effect those changes.

Draft Policies

The first step in introducing a new Compliance Rule is to add it to the “Draft Policy” (shown below). The Draft Policy starts out as an identical copy of the Active Policy and you can start making changes from there. These changes include:

- Adding new Compliance Rules
- Deleting existing Compliance Rules
- Tweaking an existing Compliance Rule

Why make changes to a Draft Policy rather than directly to the Active Policy? The main reason is that by making changes to the Draft Policy first you can preview the impact of those rule changes before putting them into effect. This gives you the opportunity, for example, to introduce a new requirement without immediately flagging all affected assets as “in violation” because of course this is a new requirement and none of them have the required certification.

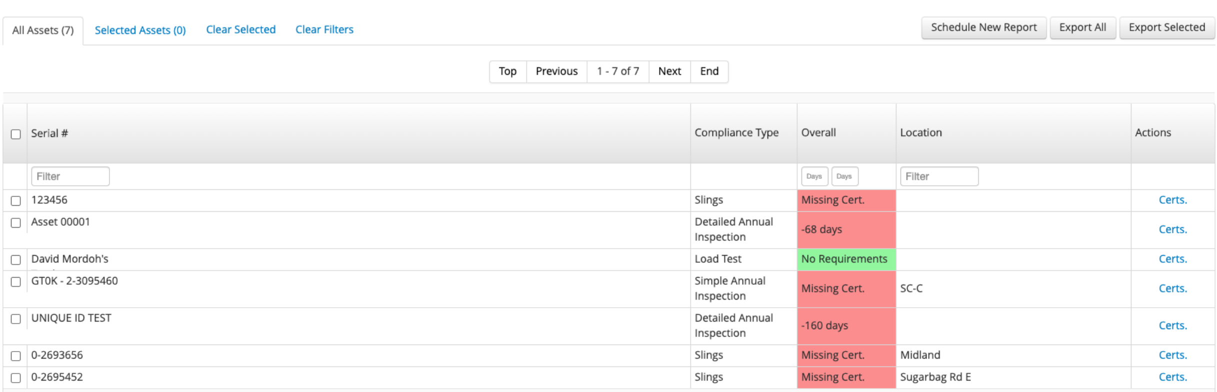
For this reason, there is only one Draft Policy at any time. Once you are satisfied with your changes to the Draft Policy, you can “Activate” that Policy, thus making it the new Active Policy.

The previous Active Policy is replaced but is still available as for historical reference, so you have a complete audit trail of what Policies and Rules were in effect when. You will also be able to see when they were changed and by whom.

Once a new Active Policy is created, a new Draft Policy is generated as an identical copy of the newly published Active Policy and the cycle begins again.

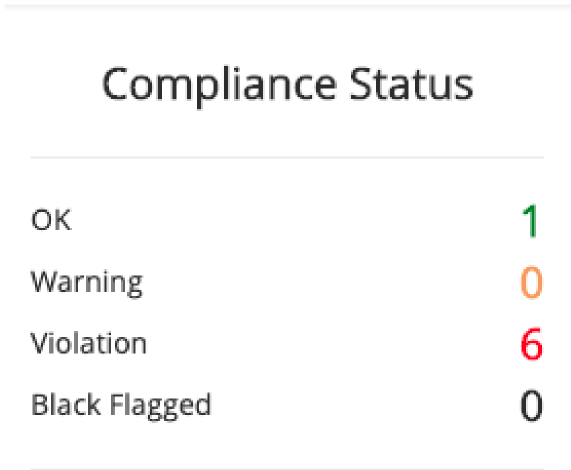
Viewing Compliance Status

The Compliance Status tab will display the current status of all your assets you have assigned to an active compliance policy. Filter by asset numbers or compliance type. You can export your report directly from this page or schedule it to send on a regular basis.


All Assets (7) Selected Assets (0) Clear Selected Clear Filters Schedule New Report Export All Export Selected

Top Previous 1 - 7 of 7 Next End

Serial #	Compliance Type	Overall	Location	Actions
Filter		Days Days	Filter	
123456	Slings	Missing Cert.		Certs.
Asset 00001	Detailed Annual Inspection	-68 days		Certs.
David Mordoh's	Load Test	No Requirements		Certs.
GT0K - 2-3095460	Simple Annual Inspection	Missing Cert.	SC-C	Certs.
UNIQUE ID TEST	Detailed Annual Inspection	-160 days		Certs.
0-2693656	Slings	Missing Cert.	Midland	Certs.
0-2695452	Slings	Missing Cert.	Sugarbag Rd E	Certs.

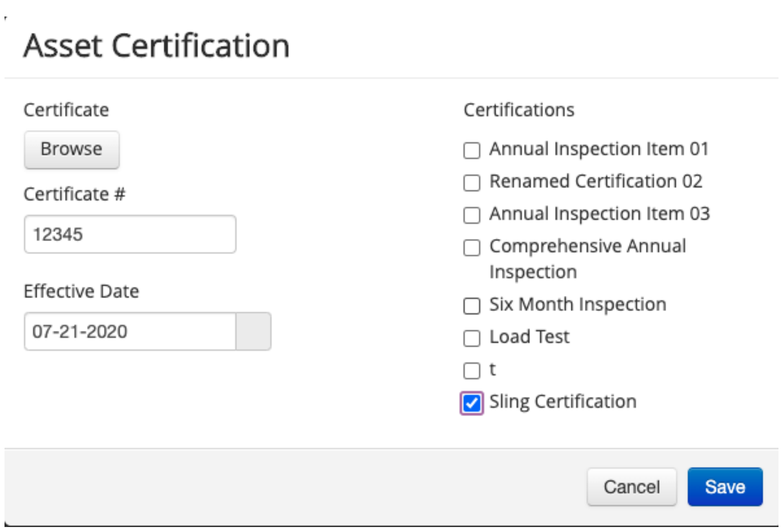


Adding Completed Certifications

Once you have your compliance certifications and types added to the system and you have assigned your assets to a policy, you want to upload your completed certifications to start tracking violations.

To do this, stay in the Compliance Status tab and view the “actions” tab for assets which need to have a certification uploaded. Clicking the hyperlink next to the asset in question will take you to the certifications screen for that asset.

Clicking “Add Asset Certification” will allow you upload a certificate, add the # and select the date it was completed.



Rental

*Rental Manager is a paid feature that enables you to leverage Track & Trace as a Rental Management Software. There are two ways you can do this. The first is Integrated Rental, which allows you to integrate your other commercial Rental Software (such as TrackQuip, Basis, RTMS) into Track & Trace. The second is by using Embedded Rental, which you can use Track & Trace as your sole Rental Management Software. Please contact Geoforce if you are interested in enabling either for your organization.

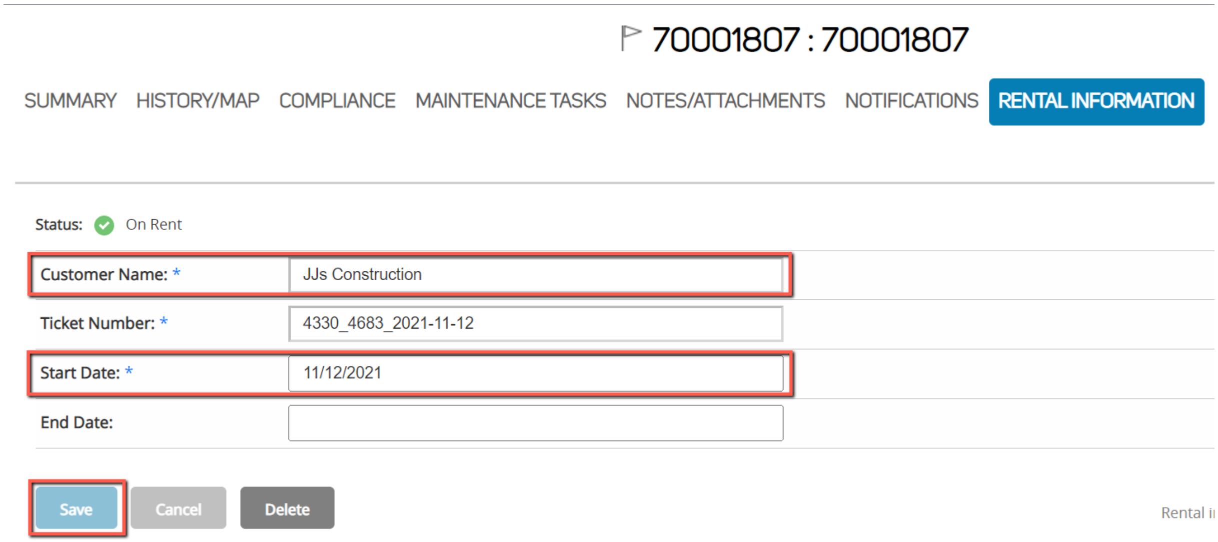
Integrated Rental

If you are integrating your existing rental software into Geoforce, we will pull data in order to show in the application and Rental Dashboard when your devices are on or off rent. You will have the functionality of Embedded Rental, but not have to manually enter the rental data.

Embedded Rental

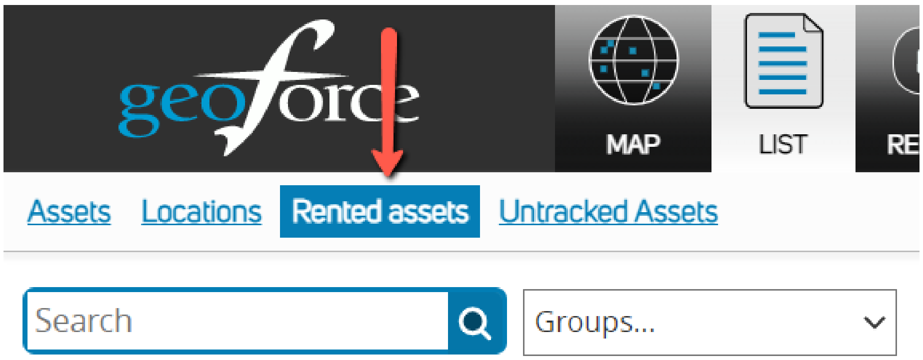
To place an asset on Rent, click on the Asset Description Page. From there, click on "Rental Information".

- Enter the customer name
- Job number (optional)
- Start Date
- End date (optional)
- Click "Start Rental"



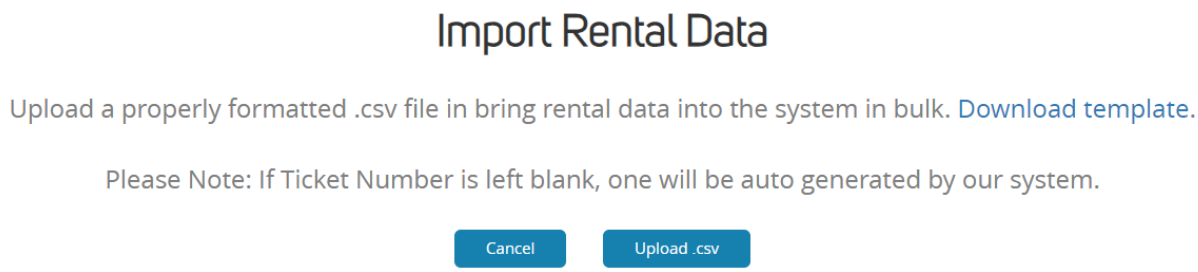
Notice that the Rental Status has changed to “On Rent” and the Rental Information entered now populates. The Rental has started. When you need to end the rental time, you can just navigate back to the “Rental Information” tab and click “End Rental”.

From the List View, you can also click “Rented Assets” to see a list of your assets currently on Rent. Additionally, you will see “On Rent”/”Off Rent” icons on the ADP.



Bulk Import

To bulk import rental information (for Embedded Rental only), click on the “List” tab, then “Rented Assets”. On the left side, click the button for “Import”. This will take you to a screen to import your rental data. You will need to download the excel spreadsheet template in order to get started.



Once you have the template filled out, you can use this module to upload the CSV.

Rental Dashboard

Please reference the Analytics Dashboard section of the user guide to learn about Rental Dashboard.

Geoforce Mobile Apps

Geoforce offers two different kinds of mobile apps for convenience and on the go asset tracking capabilities.

Track & Trace App

Supported Devices: Apple & Android

This application is a very simplified version of our Track & Trace desktop application. Once you login to your account, you can see the map view of your assets. By clicking on the map pin icon, you can see where it is reporting from, and its last seen time. You can also use the filtering button at the top right navigation to narrow your asset view to that particular group.

Mobile Field Tools (MFT)

Supported Devices: This application can only be downloaded onto Apple devices.

Geoforce: Tools is an application you can download to help manage your devices in the field. It offers many ways to update firmware, keep track of device health, and update reporting profiles.

Signing In:

1. Open the Mobile Field Tool app on your smart device.
2. Enter your username and password. Use the same login credentials that you use to sign into the Track & Trace desktop application.
3. Select "Sign In"

Home Screen

On the home screen menu, you will see all of the options to select:

- Watchlist
- Replace Tracking Device
- Asset Management
- Healthcheck
- Device Inspection
- Firmware Update
- Profile Update
- Geozones

Watchlist

This is a place where you can scan and add in devices that you would like to keep an eye on.

Replace Tracking Device

From this screen, you can replace your Geoforce device on an asset. You can do this using Bluetooth technology to scan the devices in the area and replace.

1. Select Replace Tracking Device from the Home Menu.
2. In both the "Original Device" and the "New Device" sections tap "Select Device" to input the respective serial number. This can be done one of four ways:
    a. Scan - Use the camera on the smart device.
    b. Listen - Use Bluetooth to scan for nearby tags.
    c. Asset - Search by entering Asset Information.
    d. Manual - Manually type in the device ESN (Electronic Serial Number).
3. Ensure that the serial numbers highlighted in green are correct. If they are, tap "Replace device".
4. The next screen will show confirmation of the change. To finish the process, click "Complete."

Asset Management

From this screen, you can scan a device for its status. You can then set up your asset and/or assign this tag to an asset.

Healthcheck

The Healthcheck menu option will give you a synopsis of useful information pertaining to a particular device. Once open, at the top of the screen you can select an input method for the Device Serial Number. When you find the serial number, select "Use It."

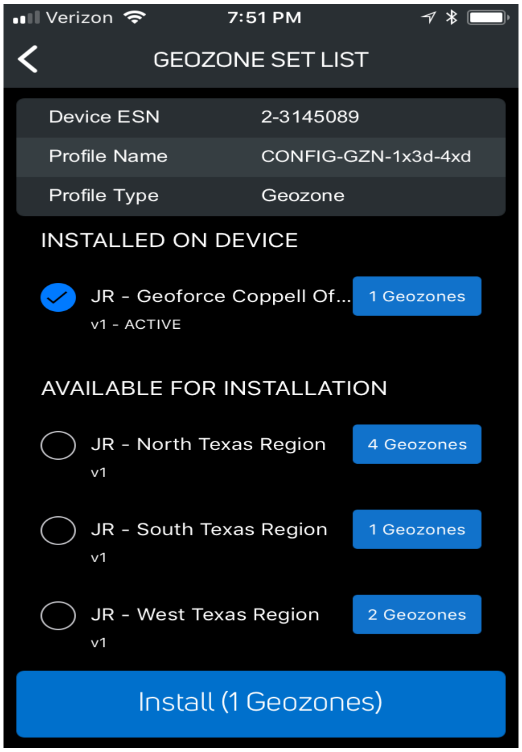
This next screen will show you a report of the scanned device. This information can be critical in following up on recently deployed devices, checking reporting data and troubleshooting in general.

Device Inspection

Once you input your device serial number (options dictated under "Replace Tracking Device") you can perform a device inspection. You can then enter your location, and the device orientation (where it is placed on the equipment), then tap next.

The next screen will lead you to the Health Check (see above section for details). At the bottom, you will find the following options:

- Watchlist: Adds this device to your watchlist.
- Maintenance Actions: This screen allows you to Report Physical Damage, Replace Tracking Device, or Replace batteries.



Firmware Update

By entering the serial number on your device (options dictated under "Replace Tracking Device") you can perform a firmware update to the device if you are within range of the device. You must be within Bluetooth range for the firmware to update.

Profile Update

From this screen you can update the reporting profile on your device. You must be within Bluetooth scanning range for this to take effect. The profile must also be added from the main Geoforce Track & Trace application in order to be selectable. See section on Device Manager for more information on adding reporting profiles to your account.

Geozones

If you purchased your device with Geozones enabled, you will be able to use this functionality to change the reporting rate on your asset. By selecting the serial number on your device, you will be able to install a new Geozone profile firmware on your asset.

Geoforce Resources

Visit our online training library for videos, how-to guides, safety resources and more! *Must be logged into the Geoforce Track & Trace application to access the training site.
www.helpdesk.geoforce.com

Have questions or need a quick tutorial?

Contact Geoforce Support

Email: helpdesk@geoforce.com

Phone: 888.574.3878 Option 2

Want to schedule a group training for organization?

Contact the Geoforce Training Team

Email training@geoforce.com with your request

Thank You!