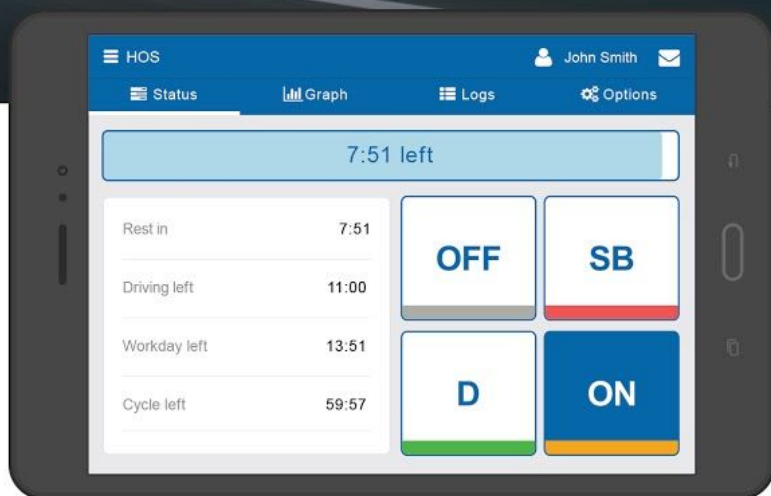


# GEOTAB

management by measurement



## Geotab Drive

Compliance and  
Implementation Guide

## Overview

The purpose of this document is to provide all the information necessary for successfully deploying a customer pilot for Hours of Service. This document is split into several sections:

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### **Driver's Guide to Geotab Drive Videos**

## Step 1: Background

The documents in the sections below will help you understand the basics behind Hours of Service, ELDs, and compliance. Some sections contain videos that provide additional information on the aforementioned topics. It is critical that you go through this material and understand the various features of the system before progressing with the pilot or rollout.

### Icon Legend



Important



Please Print

### Understanding Hours of Service

The [Hours of Service Introduction Guide](#) provides an introduction to HOS, duty limits, and duty status logs.

#### The ABCs of Hours of Service ([Video](#))

This video will help you understand what Hours of Service (HOS) are and why they're required. It will walk you through the FMCSA's 60-hour/7-day ruleset and how it works.

#### FMCSA Hours of Service Regulations

The regulations can be found [here](#).

#### Canadian Hours of Service Regulations

The regulations can be found [here](#).

### Understanding the FMCSA's Final Rule on ELDs

For information about ELDs, see the [ELD Mandate](#) presentation.

#### Understanding the ELD Mandate ([Video](#))

This video will walk you through the ELD mandate in the United States of America, and will help you understand what an ELD is, why it's required, who is exempt from the ELD mandate, and what the required functionality of an ELD system must be.

### Supported Rulesets Explained

The [Hours of Service Ruleset Matrix](#) document explains each ruleset and exemption supported by the Geotab system.



#### Cloud ELD Defined

This [document](#) explains how Geotab Drive works, including how the various parts of the system come together.

## Understanding Geotab Drive

For more information, refer to the [Geotab Drive App Manual](#) to learn about the basics of Geotab Drive. This should provide you ample information on Geotab Drive and its interaction with MyGeotab.

## Step 2: Pre-Deployment Steps

### [Geotab Drive - Compliance and Implementation Checklist](#)


To help with the deployment process use this checklist to make sure nothing is missed and your company is fully compliant. For further details concerning HOS Pilot and Onboarding Plan review this [presentation](#).

This is an important step before deploying Geotab Drive to the entire fleet. Use [Fleet Setup Project Sheet](#) to assist. Please follow the steps below:

- 1. Know the mobile device hardware being used (make, model, OS version, etc.) and ensure that the appropriate settings are enabled as listed in [Android & iOS Setup](#)
- 2. Install a remote access application on the mobile device for troubleshooting purposes:
  - a. [Teamviewer QuickSupport](#) is an app available on both [Android](#) and [iOS](#) platforms, which allows for remote access.
  - b. [SOTI](#) offers an MDM (Mobile Device Management) solution that allows administrators to remotely connect to mobile devices. It also provides the added benefit of restricting the tablet to use only allowed applications.
- 3. If the customer has a MDM solution on their mobile devices, obtain the latest [APK](#) and push to all devices
- 4. Review the cellular coverage maps to ensure the most reliable service possible for your customer's driving routes. Order devices (GO device and mobile device) with the most reliable service for those routes.
- 5. It is recommended that the [IOX-USB](#) be used in conjunction with the GO device and the mobile device to ensure that your mobile mobile device is receiving power.
- 6. [Determine](#) which harness is needed based upon the vehicle's VIN/Make/Model/Year.
- 7. Ask the customer if they want to enable data purging. The FMCSA requires that six months of driver logs and three months of DVIR data must be available for audit. If desired, enable the purge settings within System Settings of their database. Please ensure you have "Feature Preview" enabled for your user account to access the purge menu.

To learn more about data purging, please review the blog on [How Long Does Geotab Keep My Data?](#)






8. Follow the setup and installation instructions in the [Geotab Drive App manual](#).
9. Review the [Hours of Service Overview](#) video.
10. Review the [Driver Vehicle Inspection Report](#) video.
11. Inquire if the customer requires their drivers to create logs for the ON-duty status without being assigned to a vehicle. Educate them about the "No Vehicle" option within Geotab Drive for scenarios like this.
-  12. Ask the carrier if they have any existing time clock systems for their drivers to punch in and out. If so, can we integrate with the system so that it creates an ON-duty log when punching in and an OFF-duty log when punching out? Check if a [Geotab Marketplace](#) solution already exists.
13. Deploy to 5–10 drivers for 1–2 weeks to understand the process steps before the full rollout. If the company decides to run Geotab Drive along with a paper logbook (where the logbook is the primary source of logs), ask the customer to have a letter for the DOT officer explaining this. Here is a [template](#) they can use.
14. Ensure that the following documents below are printed and kept within the cab of all the vehicles:
  - a. [HOS & Inspection Report](#) (Must be printed and kept in the cab as per law)
  - b. [DVIR Workflow](#)



**Best Practice:** Train drivers to log out of the Drive app at the end of the day.

## Step 3: Deployment Processes

-  1. Ensure that the following documents below are printed and kept within the cab of all the vehicles.
  - a. [HOS & Inspection Report](#) (Must be printed and kept in the cab as per the law.)
  - b. [DVIR Workflow](#)
-  2. Follow the Setup instructions in the [Administrator's Guide for Compliance](#).
-  3. Print either the [Android Troubleshooting Guide](#) or [iOS Troubleshooting Guide](#), depending on the hardware, and provide a copy to all the driver managers/supervisors. It is important for them to understand the common issues and how to resolve them.
4. Print the [Administrator's Guide for Compliance](#) for all the administrators/dispatchers.
5. Bring all the drivers in to view the following videos:
  - a. [Hours of Service Overview](#) video.
  - b. [Driver Vehicle Inspection Report](#) video.



6. Print copies of the following [Geotab Drive Driver's Quiz](#) and provide them to your drivers to ensure they are properly equipped to use the Geotab Drive app.
7. For the first 4–8 weeks, schedule weekly review meetings to keep all supervisors informed and to discuss any questions about the app. It is also recommended that administrators subscribe to [Geotab Drive \(HOS & DVIR\) Support Forum](#) for the latest updates for Geotab Drive.
8. If the customer has Trailers, create a group called "Historic Trailers". If a trailer needs to be removed from the system, all data associated with it (DVIR, and Trailer attachment info) will be removed. So if you want to keep the historical information, move the trailer to this group when it gets deprecated.

## Step 4: Ongoing Supervision

With the use of reports, your customer can monitor and review how their drivers are using the system. For additional reports, see [Reports section](#) below.

### Daily

1. Driver supervisors need to review the reports below to ensure the system is being used properly:
  - a. [ELD: Number of Drivers Placed ON Duty \(Dashboard\)](#)
  - b. [DVIR: Defects Alert \(Email\)](#)
  - c. [ELD: HOS Driver Violation Alert \(Email\)](#)
  - d. [ELD: Notify Dispatch if Driver is Approaching Limit \(Email\)](#)
  - e. [ELD: Hours Gained \(Email\)](#)
  - f. [DVIR: Defects Alert \(Email\)](#)

### Weekly

1. Organize a weekly touch-base call with the customer.
2. Fill out the [Pilot Issues Tracksheet](#) document.
3. Driver supervisors need to review the reports below to ensure drivers are verifying their logs routinely:
  - a. [ELD: Unverified Logs \(Email & Dashboard\)](#)
  - b. [ELD: Total HOS Violations by Reasons \(Email or Dashboard\)](#)
  - c. [ELD: Distance Driven While ON Duty Status \(Dashboard\)](#)
  - d. [ELD: HOS Violations Cost \(Email & Dashboard\)](#)
  - e. [ELD: Excessive Personal Conveyance \(Email or Dashboard\)](#)
  - f. [ELD: OFF Duty to Drive Instances \(Dashboard or Email\)](#)
  - g. [DVIR: Problematic \(Email\)](#)
  - h. [Small Fleet Driver Payroll Report](#) (Bi-Weekly)

## Monthly

1. Go through the monthly [What's New](#) blog post and let your customer know about any new features added to the system.

## Step 5: Troubleshooting

If any issues arise during the pilot, please read through the following guides. If you're still unable to find a solution, escalate the issue to Geotab Support.

### Android Troubleshooting Guide

The Geotab Drive [Android Troubleshooting Guide](#) is designed to assist drivers who are experiencing issues with Geotab Drive on Android devices.

### iOS Troubleshooting Guide

The Geotab Drive [iOS Troubleshooting Guide](#) is designed to assist drivers who are experiencing issues with Geotab Drive on iOS devices.

### Troubleshooting & Useful Info


The [Geotab Drive Troubleshooting & Useful Information Guide](#) is designed to help resellers troubleshoot Geotab Drive-related issues before escalating them to Geotab.

## Appendix

### Driver Guides

#### HOS & Inspections Report

This [Driver's Guide to HOS and Roadside Inspection Reports](#) is a short guide for drivers to learn how to use Hours of Service within the Geotab Drive app.


 **Important:** This document must be kept in the CMV at all times and must be made available during a roadside inspection in accordance to §395.15 (g)(1).

#### DVIR Workflow

The [DVIR Workflow](#) guide is a short introduction for drivers to the DVIR workflow within the Geotab Drive app.

## Administrator Guides

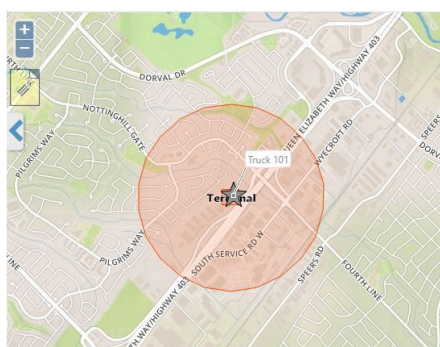
### Administrator's Guide for Compliance

 **Note:** Print and provide this document to all administrators.

Before using Geotab Drive as an HOS solution, please ensure that you have followed the steps outlined in the [Administrator's Guide for Compliance](#).

#### Short Haul

1. Use the following [100 Airmile Radius Zone Upload Template](#) and use the **Import Zones** tool on MyGeotab to create a 100-air-mile-radius zone around the main office location.
2. Create a rule to flag instances when the driver goes outside the 100-air-mile radius.
3. Add driver feedback to send a text message to the administrator whenever the vehicle goes outside of the 100-air-mile radius.



### Exception Rule Edit ?

Name
Conditions
Notifications

**CONDITIONS**

Add engine	Add zone or zone type	Add speed
Add speed limit	Add duration	Add distance
More...		

Exiting Area 'Terminal'



## Reports

The reports below are split into two sections:

1. [Hours Of Service](#)
2. [Driver Vehicle Inspection Reports](#)

These reports are intended for dispatchers and administrators to better understand their fleet and to use the system to its full capability.

### Hours Of Service



#### ELD: Distance Driven While ON Duty Status ([Dashboard](#))

This report helps to identify instances where a driver's duty status was set to ON Duty but the vehicle was actively driven. This report is intended to help with investigating the root causes behind driving while in the On-Duty status. For example, the driver may not be plugging in the mobile device to a power source, as required, while operating the vehicle.

It is recommended that this report's date range be set to **Last week** and the report refresh period be set to **Weekly**.

<https://www.geotab.com/marketplace/custom-report/eld-distance-driven-duty-on/>



#### ELD: Number of Drivers Placed ON Duty ([Dashboard](#))

At the beginning of a pilot or rollout, drivers may forget to log in to the system before operating their vehicle. This report is intended to help you understand how many drivers are actively logging in to the system. This report is intended to capture the number of drivers that are placed ON Duty daily. It is recommended that this report's date range be set to **Yesterday** and the report refresh period be set to **Daily**.

<https://www.geotab.com/marketplace/custom-report/eld-drivers-placed-on-duty/>



**Note:** This report will only work well if drivers are proactive about logging in and out of the system everyday. This report will not be useful for carriers whose drivers leave themselves logged in for multiple days.



#### ELD: Severe HOS Violations Cost ([Email & Dashboard](#))

The FMCSA considers any driver who continues to drive for more than three hours beyond their driving limits as an egregious violator. The carrier can be fined up to \$16,000, while the driver can be fined up to \$3,750.

This report captures any egregious hours of service violations that are longer than three hours and plots the total potential cost of these violations to your organization on a graph. It is recommended that this report's date range be set to **Previous 7 days** and the report refresh period be set to **Weekly**.

<https://www.geotab.com/marketplace/custom-report/eld-egregious-violations-cost/>



## **ELD: Excessive Personal Conveyance** ([Email or Dashboard](#))

This report allows the carrier to see when drivers are abusing personal conveyance rules.

The carrier is able to specify the value they consider to be excessive use of personal conveyance. By default, excessive use is set to be over 47 mi. or 75 km per driver.

It is recommended that this report's date range be set to **Previous 7 days** and the report refresh period be set to **Weekly**.

<https://www.geotab.com/marketplace/custom-report/eld-excessive-pc/>



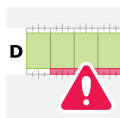
## **ELD: Hours Gained** ([Email](#))

Only for 60-hour/7-day and 70-hour/8-day FMCSA rulesets.

This report is intended to help dispatchers understand how much time will be gained by drivers on 60-hour/7-day and 70-hour/8-day rulesets when a new day begins. Recall that 60- or 70-hour cycle limits are a rolling count. This means that when the current day ends, your previous 7th or 8th day will not be part of the ruleset calculation anymore, and you will gain that time back on your cycle.

This report's date range must be set to **Previous 7 days** and the report refresh period be set to **Daily**.

<https://www.geotab.com/marketplace/custom-report/eld-hours-gained/>



## **ELD: HOS Driver Violation Alert** ([Email](#))

Receive an alert (within 30 minutes) every time a driver drives in violation of their daily HOS limits and review the violations.

It is recommended that this report's date range be set to **Previous hour** and the report refresh period be set to **Every 30 minutes**.

<https://www.geotab.com/marketplace/custom-report/eld-driver-violations-alert/>



## **ELD: OFF Duty to Drive Instances** ([Dashboard or Email](#))

This report lists all instances of a driver switching from the Off-Duty status directly to the Drive status. Generally, drivers must first be in the On-Duty

status as they do a vehicle inspection before driving their vehicle. This report will flag instances where this On-Duty status was absent.

It is recommended that this report's date range be set to **Last week** and the report refresh period be set to **Weekly**.

<https://www.geotab.com/marketplace/custom-report/eld-off-duty-drive-instance/>

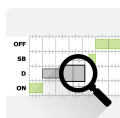


## ELD: Total ELD Violations by Reasons ([Dashboard](#))

This report provides a snapshot of the current HOS violations within your organization.

It is recommended that this report's date range be set to **This week** and the report refresh period be set to **Weekly**.

<https://www.geotab.com/marketplace/custom-report/eld-total-hos-violations/>

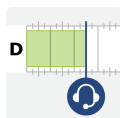


## ELD: Unverified Logs ([Email & Dashboard](#))

This report lists the drivers who have not verified their logs. It is important to note that drivers only have up to 7 days to sign off on their logs.

It is recommended that this report's date range be set to **Previous 14 days** and the report refresh period be set to **Every 2 weeks**.

<https://www.geotab.com/marketplace/custom-report/eld-unverified-logs/>



## ELD: Notify Dispatch if Driver is Approaching Limit **Coming Soon**

The purpose of this report is to alert (within 30 minutes) a manager or dispatcher when a driver is approaching one of their HOS limits.

It is recommended that this report's date range be set to **Previous hour** and the report refresh period be set to **Every 30 minutes**.



## Small Fleet Driver Payroll ([Email](#))

This report helps to accurately track the number of hours a driver clocks in and out through the use of Geotab Drive. It is recommended that this report be used as an e-mailed report for fleets with less than 50 drivers.

This report is best viewed as a PDF.

It is recommended that this report's date range be set to **Last 14 days** and the report refresh period be set to **Last 2 weeks**.

<https://www.geotab.com/marketplace/custom-report/eld-small-fleet-driver-payroll/>

## Driver Vehicle Inspection Reports



### DVIR: Alert Defects ([Email](#))

Receive an alert (within 30 minutes) every time there is a defect reported in a Driver Vehicle Inspection Report. Configure this report to be emailed to a manager.

It is recommended that this report's date range be set to **Previous hour** and the report refresh period be set to **Every 30 minutes**.

<https://www.geotab.com/marketplace/custom-report/dvir-defects-alert/>



### DVIR: Problematic DVIR ([Email](#))

[Pre-Trip DVIR Completed, but Not Post-Trip](#)

This emailed report is ideal for organizations who have drivers that start and end their work day within the same calendar day (i.e. no overnight drivers) and require their drivers to do both Pre-Trip and Post-Trip inspections.

It is recommended that this report's date range be set to **Last week** and the report refresh period be set to **Weekly**.

<https://www.geotab.com/marketplace/custom-report/dvir-problematic/>

## Add-Ins and Useful Tools



To install each of the add-ins below, from the main menu within MyGeotab, click on Marketplace and search for desired add-in. Search for the desired, add-in by name and

[Install Now](#)

then select the Install button or manually add it to database by following the steps within each text file below.



### Border Crossing Add-In (60-hour/7-day)

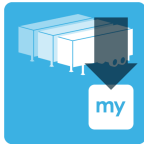
Drivers who cross the USA-Canada border can install the [Border Crossing Add-In](#) to easily switch between the USA 60-hour/7-day and Canada Cycle 1 rulesets.



### Border Crossing Add-In (70-hour/8-day)

Drivers who cross the USA-Canada border can install the [Border Crossing Add-In](#) to easily switch between the USA 70-hour/8-day and Canada Cycle 1 rulesets.





### Bulk Import Trailers

Import your trailers in bulk into the MyGeotab system with this [Bulk Import Trailers Add-In](#).



### Fuel Tracker

The [Fuel Tracker add-in](#) will assist Drivers add their Fill-Up information like Volume, Cost and other pertinent information. Once the application has been added, ensure that the following clearances has been enabled for any driver using the application: "view fill ups and fuel transactions" and "administer fuel transactions clearances to work".

### Bulk Import HOS Logs Tool

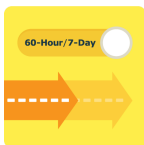
Import drivers' HOS logs in bulk with this useful [tool](#). This Bulk Import HOS Logs tool can be used to import HOS logs from another system.

### Import DVIR Tree Tool

Import a custom DVIR list into MyGeotab with ease. The [Import DVIR List](#) tool allows you to copy and paste a list from Excel into the Geotab system. Each line must be formatted in the form "part|defect|severity" in order for a successful import.

### Kiosk Mode (Clock In & Out) Tool

This [Geotab Kiosk](#) tool allows drivers to log themselves as ON duty or OFF duty at a kiosk. When the driver logs in to Geotab Drive, later in their day, this log will be present. This kiosk tool allows for more accurate logging and provides the company a simple punch-in-punch-out system.



### Short Haul Switcher (60-hour/7-day)

With the [Short Haul Switcher \(60-hr-7-day\) Add-In](#), drivers can easily apply and remove the Short Haul Exemption. This Add-In is for the 60-hour/7-day ruleset. For carriers interested in the 70-hour switcher, please press this link: [Short Haul Switcher \(70-hr-8-day\) Add-In](#)



### Short Haul Switcher (60-hour/7-day) Big Day

With the [Short Haul Switcher \(60hr7day 'Big Day'\) Add-In](#), drivers can easily apply and remove the Short Haul Exemption. This Add-In is for the 60-hour/7-day ruleset with the 16 hour exemption applicable.

## Driver's Guide to Geotab Drive Videos

For more helpful how-to videos, visit the [Geotab](#) Youtube Channel.

### Geotab Drive | Hours of Service Overview Video

(<https://youtu.be/OzASAt5SKBQ>)



Through this video overview of Geotab Drive, you will learn how to use the application for Hours of Service (HOS) and Driver Vehicle Inspection Reports (DVIR).

The video contains a walkthrough of logging in to the Geotab Drive app, selecting a vehicle, trailer, creating a Driver Vehicle Inspection Report, going through the Hours of Service menu, and logging out.

This video is aimed at drivers, to provide them with a thorough understanding of how to use the application.

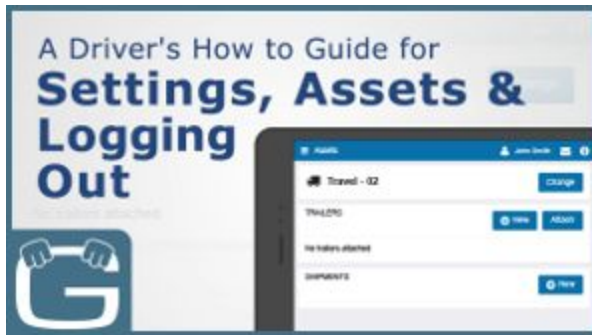
### Geotab Drive | How to Guide for Driver Vehicle Inspection Reports (DVIR) Video

([youtu.be/H\\_0cSH9u60](https://youtu.be/H_0cSH9u60))



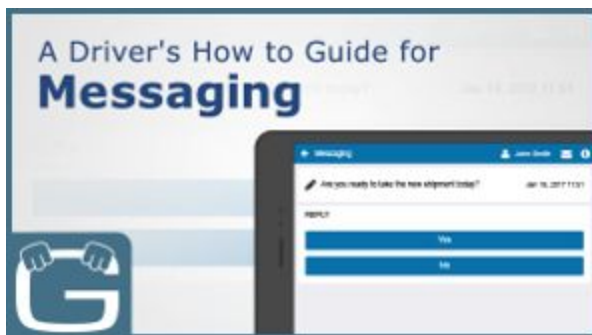
Through this video walkthrough of Geotab Drive, you will learn how to use the Driver Vehicle Inspections Report (DVIR) feature for conducting your vehicle inspections. Through the improved DVIR workflow, Geotab Drive allows for an easy-to-follow reporting process for defects or repairs made to vehicles and assets.

## Geotab Drive | How to Guide for Settings, Assets & Logging Out Video ([youtu.be/dH0QwWUIAgM](https://youtu.be/dH0QwWUIAgM))



Through this video walkthrough of Geotab Drive, you will learn how to use Geotab Drive in order to view and change settings, modify assets, and review your Hours of Service (HOS) duty status before logging out.

## Geotab Drive | How to Guide for Messaging ([youtu.be/3AJv1Q0FapQ](https://youtu.be/3AJv1Q0FapQ))



Through this video walkthrough of Geotab Drive, you will learn how to access and use the messaging feature of the app.