

CoPilot FleetPortal Transition Guide

1. Overview

The New CoPilot FleetPortal provides a redesigned, more user friendly interface allowing you to manage your fleet more efficiently with added features and functionality found in ALK Content Tools and CoPilot RouteReporter. The transition guide is to help you familiarize with accessing the features in the new design. Here's an overview:

Custom Vehicle Routing and Configuration data is still accessible in CoPilot FleetPortal. See Figure 1.

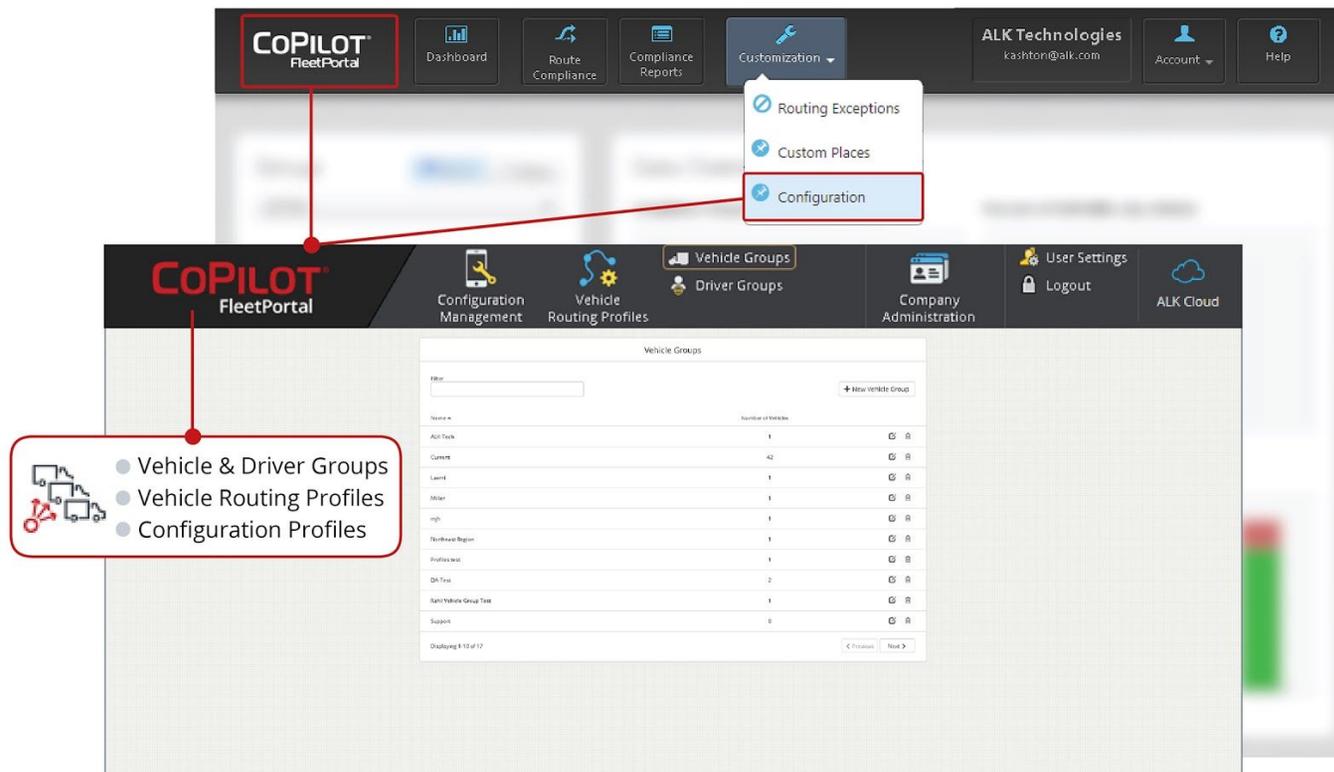


Figure 1. CoPilot FleetPortal

Custom Location Content is now accessible through ALK Content Tools. See Figure 2.

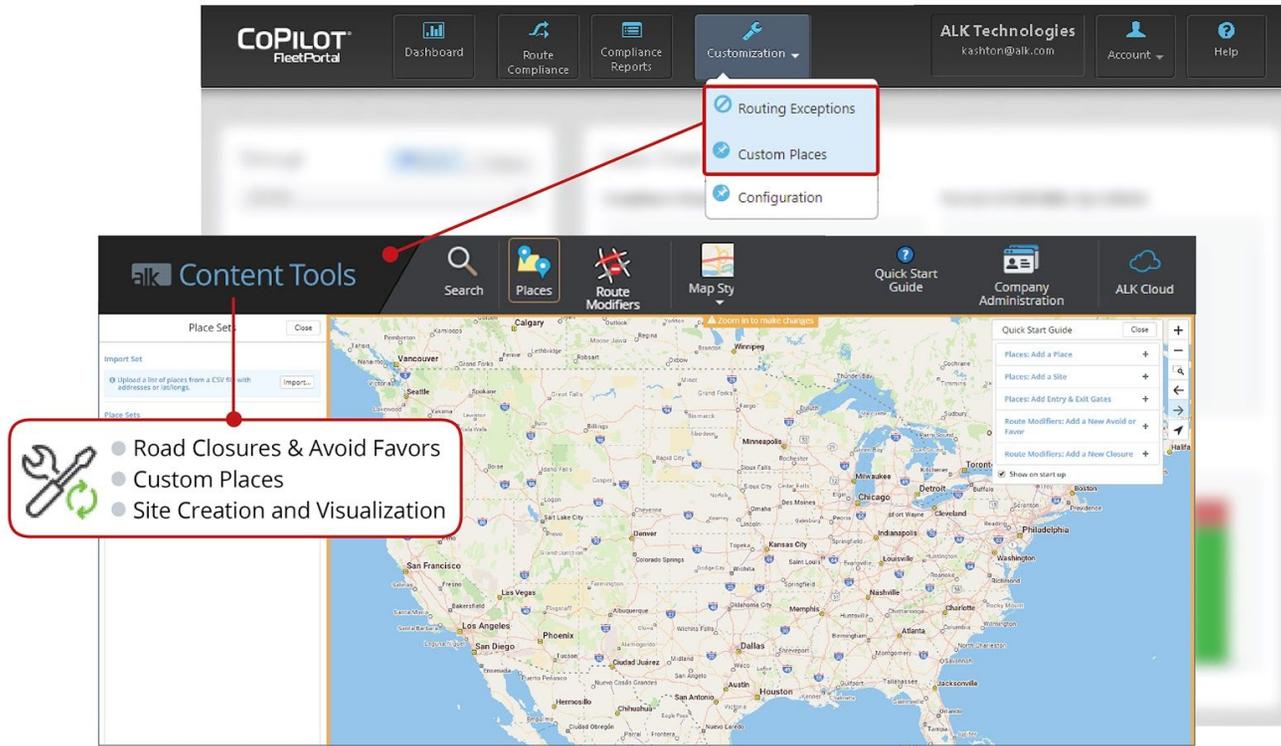


Figure 2. ALK Content Tools

Route Compliance can now be found in CoPilot RouteReporter. See Figure 3.

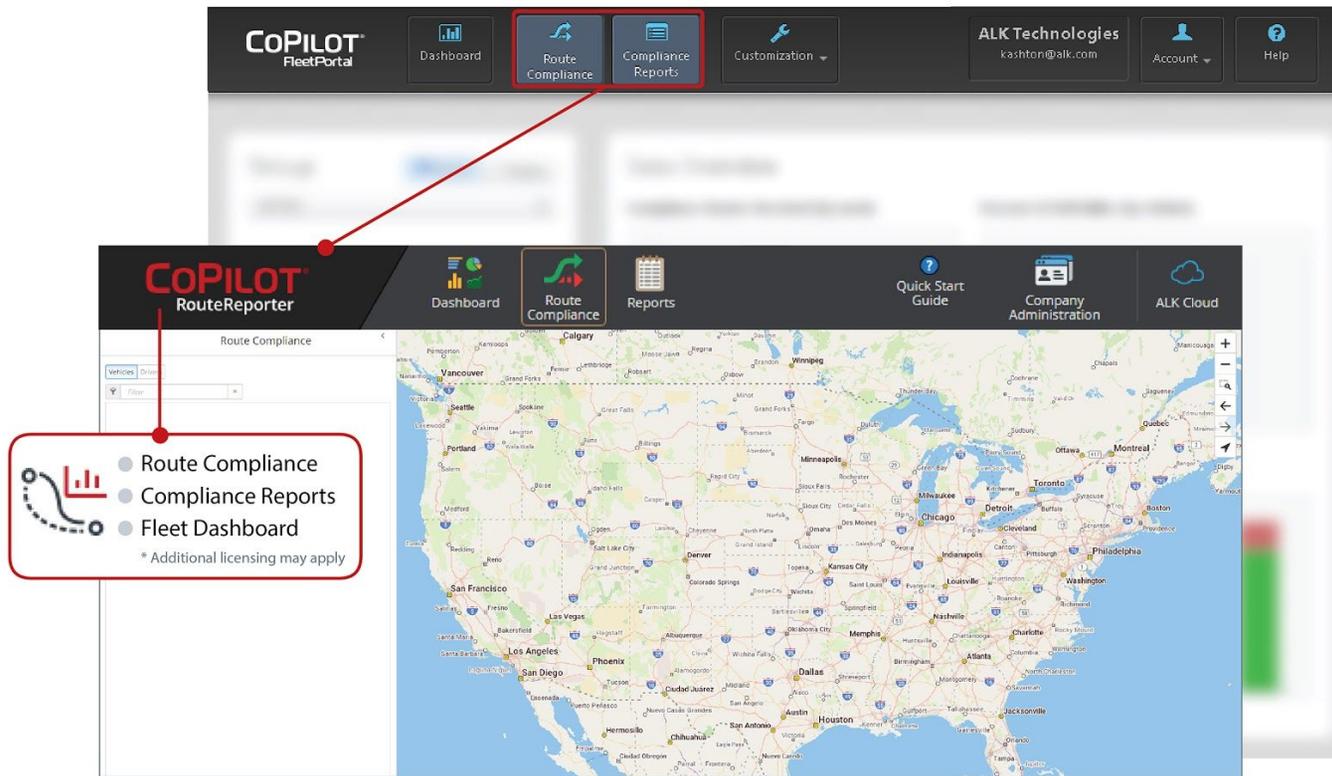


Figure 3. CoPilot RouteReporter

2. Step-by-step guide to access features in New CoPilot FleetPortal

Feature	Old CoPilot FleetPortal	New CoPilot FleetPortal
<p>Add more users to my account</p>	<p>Click the Account button in the top menu ribbon and go to Account Settings</p> <ul style="list-style-type: none"> ➤ In the Users List, you can view all current users ➤ Click Add User to add new users to the account 	<p>Click the Company Administration button in the top menu ribbon</p> <ul style="list-style-type: none"> ➤ Click the Users tab to view all current users ➤ Next, click New to add new users to the account
<p>Add New Vehicle Groups</p>	<p>Click the Account button in the top menu ribbon and go to Account Settings</p> <ul style="list-style-type: none"> ➤ In the Vehicles List section, select Manage Groups ➤ Click the Vehicles tab and select Add Vehicle Group to create the desired vehicle group 	<p>Click the Vehicle Groups button in the top menu ribbon</p> <ul style="list-style-type: none"> ➤ Click New Vehicle Group and assign a name to this vehicle group ➤ Click Add to add vehicles
<p>Add New Driver Groups</p>	<p>Click the Account button in the top menu ribbon and go to Account Settings</p> <ul style="list-style-type: none"> ➤ In the Vehicles List section, select Manage Groups ➤ Click the Drivers tab and select Add Driver Group to create the desired driver group 	<p>Click the Driver Groups button in the top menu ribbon</p> <ul style="list-style-type: none"> ➤ Click New Driver Group and assign a name to this driver group. ➤ Click Add to add drivers
<p>Create and assign Vehicle Routing Profiles</p>	<p>Click Customization button and select Configuration</p> <ul style="list-style-type: none"> ➤ Click Create New Routing Profile or Add Routing Profile ➤ Enter the routing profile name and click Save. ➤ Choose the desired routing options <p>To assign a Vehicle Routing Profile to a Vehicle Group:</p> <ul style="list-style-type: none"> ➤ Click Add Vehicle Group and choose the vehicle groups to which this profile must be assigned 	<p>Click Vehicle Routing Profiles in the top menu ribbon</p> <ul style="list-style-type: none"> ➤ Click New Profile to enter the desired Vehicle Routing Profile details <p>To assign a Vehicle Routing Profile to a Vehicle Group:</p> <ul style="list-style-type: none"> ➤ Click the Assignments tab to assign the vehicle routing profile to one or more Vehicle groups ➤ In the Assignments tab, click on Add to select the Vehicle Groups that should use this Vehicle routing profile

<p>Create and assign Configuration Profiles</p>	<p>Click Customization button and select Configuration</p> <ul style="list-style-type: none"> ➤ Click Configuration Profile and then click Create New Configuration Profile or Add Configuration Profile ➤ Enter the configuration profile name and click Save. ➤ Choose the desired configuration options <p>To assign a Configuration Profile to a Vehicle Group:</p> <ul style="list-style-type: none"> ➤ Click Add Vehicle Group and choose the vehicle groups to which this profile must be assigned 	<p>Click Configuration Management in the top menu ribbon</p> <ul style="list-style-type: none"> ➤ Click New Profile in the configuration management page ➤ Set the desired configuration options <p>To assign a Configuration Profile to a Vehicle Group:</p> <ul style="list-style-type: none"> ➤ Click the Assignments tab to assign this vehicle routing profile to a Vehicle Group ➤ In the Assignments tab, click Add to assign this profile to a Vehicle Group <p>Note: A Vehicle Group can only be assigned to one Configuration Profile</p>
<p>Access Vehicle Summary Report</p>	<p>Click the Account button in the top menu ribbon and go to Account Settings</p> <ul style="list-style-type: none"> ➤ Click the Download link to download the Vehicle Summary Report <ul style="list-style-type: none"> ○ The report is a comma separated list (.csv file) of all vehicles with detailed information regarding the last time the vehicles connected to CoPilot FleetPortal to receive updates, the app version and map data version of CoPilot being used within the vehicles 	<p>Click the Company Administration button in the top menu ribbon</p> <ul style="list-style-type: none"> ➤ Click the Vehicles tab and then click the Settings button ➤ Click Export to download the Vehicle Summary Report <ul style="list-style-type: none"> ○ The report is a comma separated list (.csv file) of all vehicles with detailed information regarding the last time the vehicles connected to CoPilot FleetPortal to receive updates, the app version and map data version of CoPilot being used within the vehicles

Feature	Old CoPilot FleetPortal	New ALK Content Tools
Creating a Custom Place	Click Customization and select 'Custom Places' <ul style="list-style-type: none"> ➤ Click on the Import Custom Places to open up the panel ➤ Click on 'Browse' to choose a comma or a pipe separated file from file systems and upload the file. ➤ Click on 'Next' to go to 'Set Details' screen, which includes Set Name, Set Type, and CoPilot Settings. ➤ Click on 'Next' to go to Review screen. ➤ Click on 'Finish'. 	Click on the Places button in the top menu ribbon bar to open up the Place Sets panel <ul style="list-style-type: none"> ➤ Click on the 'Import...' button to open the 'Import Places' pop-up window. ➤ Click on 'Choose file...' to choose a file from file systems. The application auto detects the separator; or drag and drop a file directly into the 'drop file here' area. ➤ Click on 'Continue' to go the 'Select Fields' screen. By default, all 'Field Names' are checked. ➤ Click 'Continue' to go to 'Import Match Results' screen. Here, you can choose to skip an address. ➤ Click on 'Finish'. ➤ You can also create Place Sets by clicking on 'New Set' button.
Creating Sites	Not Present.	To create a Site: <ul style="list-style-type: none"> ➤ Select a saved Place Set. ➤ Click on 'New' in the Site section. ➤ Click anywhere on the map to begin drawing the Site polygon around the Place. ➤ Double-click to finish drawing
Adding Entry/Exit Gates	Not Present.	To add 'Entry', 'Exit', and 'Entry/Exit' Gates: <ul style="list-style-type: none"> ➤ Select a Site ➤ Click on 'Add Gate' under the 'Site' name section. ➤ Click inside the Site polygon or on the edge to define the Entry/Exit Gates for the Site. ➤ Select and drag the Gate location or the routable point to change its placement. ➤ For Exit Gates, repeat steps 1-3 above. Finally, click on 'Save' to save the changes. ➤ For Entry+Exit Gates, repeat steps 1-3 above. Finally, click on 'Save' to save the changes.

		<ul style="list-style-type: none"> ➤ You can also change the Gate type from the 'Gate Type' drop-down menu.
<h3>Importing Avoids and Favors</h3>	<p>Click Customization and select 'Routing Exceptions'</p> <ul style="list-style-type: none"> ➤ In the 'Avoids & Favors' panel, click on 'Import Avoids/Favors' to open up 'Import Avoid/Favor File' pop-up window. ➤ Click on 'Browse' to select a 'flattened_af.dat' file from PC*MILER. ➤ Click on 'Import' to import the A/Fs. 	<p>Click on Route Exceptions in the top menu ribbon bar to open up 'Route Exception Sets' panel. Creation of 'Avoids/Favors' is done in two ways:</p> <ul style="list-style-type: none"> ➤ Click on 'Import...' in the Route Exception Sets panel to import a list of Avoids/Favors as either a 'New Set' or 'Append to Set'. <ul style="list-style-type: none"> ○ Click on 'New Set' and type the name of the 'New Set'. ○ Click on 'Save' to save the Set. ➤ Click on 'Add New Exception' or select a road to start adding Avoids or Favors. <ul style="list-style-type: none"> ○ Use the options to change the type. Click or drag to select roads. ○ Hold 'Shift' to unselect. Hold 'Space' to pan the map. Press 'Escape' to cancel selection box.
<h3>Creating Road Closures</h3>	<p>Click Customization and select 'Routing Exceptions'</p> <ul style="list-style-type: none"> ➤ Click on the '+ Add Closure' button. ➤ Click on the road segment on the map that will receive the temporary Road Closure designation. Be sure to zoom in sufficiently on the map to select the correct road segment. ➤ A pop-up dialogue box will appear. Select the Road Closure set name of which this temporary Road Closure will become a part. ➤ Enter in the name for the specific Road Closure. ➤ Click on the 'Add' button to create the new Road Closure, or click on 'Cancel' to exit the dialogue without saving the new Road Closure. 	<p>Click on Route Exceptions in the top menu ribbon bar to open up 'Route Exception Sets' panel.</p> <ul style="list-style-type: none"> ➤ Select the Closures Set in the 'Route Exceptions panel'. A Closures Set is created by default in the Route Exceptions panel. ➤ Click on 'Add New Closure' or select a road to start adding closures. Click or drag to select roads. ➤ Hold 'Shift' to unselect. Hold 'Space' to pan the map. Press 'Escape' to cancel selection box. The road closure(s) are represented by red color on the map

Feature	Old CoPilot FleetPortal	New CoPilot RouteReporter
<p>View Route Compliance Information</p>	<p>Click the Route Compliance button in the top menu ribbon</p> <ul style="list-style-type: none"> ➤ Select the desired Vehicle or Driver Group in the drop down menu ➤ Select the date range and appropriate data filters ➤ Click View Selected Vehicles <p>Data visualization of the selected group Route Compliance data is visualized on a map with the detailed information in the visible rows of the linked table below the map</p> <ul style="list-style-type: none"> ➤ The table shows up to 25 routes at a time. The map visualization by default displays all 25 routes, each with its own color matching the row in the table ➤ The map starts out centered on the routes, automatically zoomed in to show all 25 routes ➤ To expand the map further, you can click the Hide button to minimize the Actual and Planned Routes table or click the button to minimize the Groups and Filter sections 	<p>Click the Route Compliance button, a side menu pops up with the option to view Vehicle Groups or Driver Groups</p> <ul style="list-style-type: none"> ➤ Toggle between Vehicle and Driver Groups by selecting one of Vehicles or Drivers buttons ➤ Select the date range and appropriate data filters ➤ Click View Selected Vehicles <p>Data visualization of the selected group Route Compliance data is visualized on a map with the detailed information in the side menu panel</p> <ul style="list-style-type: none"> ➤ The side menu panel shows up to 10 routes at a time ➤ The map visualization by default displays all 10 routes, each with a different color for distinct identification ➤ Click the icons   to show or hide all routes. ➤ For each route executed, you can see the planned and actual distance and duration information ➤ Toggle the switch next to each route to display the route on the map ➤ Events refer to the Out-of-route events or the number of times the driver deviated from the planned trip <ul style="list-style-type: none"> ○ Click Events to view all the out of route deviations along the planned route
<p>Access Route Compliance Reports</p>	<p>Click the Compliance Reports button in the top menu ribbon</p> <ul style="list-style-type: none"> ➤ Select the desired Vehicle or Driver Group in the drop down menu ➤ Select the date range and appropriate data filters 	<p>Click the Reports button in the top menu ribbon</p> <ul style="list-style-type: none"> ➤ Select the desired Vehicle or Driver Group to view all vehicles or drivers in the group ➤ Select one or more vehicles

	<ul style="list-style-type: none">➤ Click View Selected Vehicles➤ Click on CSV to download the compliance information	<ul style="list-style-type: none">➤ Select the date range and appropriate data filters➤ In the Compliance Reports panel, use the filters to narrow down the search by using one or a combination of vehicle name, route source, and routing profile used➤ Click on CSV to download the compliance report
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