



CHECKmate  
by

GEOTAB

Fleet recording, reporting and analysis solution

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# GEOTAB CHECKMATE REPORTING SOLUTIONS GUIDE

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# 1. GEOTAB BACKGROUND

GEOTAB is a North American company that develops fleet business solutions using proprietary, patent pending GPS vehicle systems and fleet management software. GEOTAB is a Microsoft Product Integration Partner whose application is simple to use and to generate meaningful information for management and employees.

Driver ID Key	Data Transfer	GEOTAB GO Unit – passive onboard recording	GEOTAB GPS Antenna receive vehicle position and speed anywhere in the world
			

All fleets have one thing in common – the need to know how assets are used in the field. Through the use of GEOTAB fleet systems, management in fleet, risk and administration can make knowledge-based decisions on what, if any, action steps are required to improve operations.

Fleet operating budgets must be managed within the framework of new technology development. Implementing new technology within a fleet must have attainable payback goals.

GEOTAB provides high resolution information on how vehicles are used in the field. GEOTAB foundation technology is passive – meaning there are **no monthly costs** in cellular or satellite time. All data is recorded inside the GEOTAB Data Recorder and then is transferred from the vehicle either using a memory key or by using a wireless extraction method.

The clear advantage to fleets is that first GEOTAB will identify the information needed to take further actions steps at the lowest possible cost per vehicle. If a real time solution is needed for a portion of the fleet (not all vehicles need to be found in the field at any given time), then fleets can simply plug in a real time cellular component to the modular GEOTAB foundation vehicle kit.

In addition, if the fleet requires a handheld device for mapping or navigation, the device can be plugged into 1 of 3 available ports on the GEOTAB base unit. GEOTAB’s modular design provides future scalability to adapt to new emerging technologies.

GEOTAB is the right choice for fleets that need clarity on field operations from a variety of management offices including risk management, field management, fleet maintenance, fuel tax rebates and customer relations management.

GEOTAB benefits fleets by driving down the cost of business directly through reduced fuel costs, reduced accident or legal claims and indirectly through improved customer retention, employee productivity and safety record. GEOTAB benefits the environment by giving fleet managers unprecedented visibility of excess fuel consumption in the field and can capture distance driven off-road and within state to assist in managing fuel tax rebates.

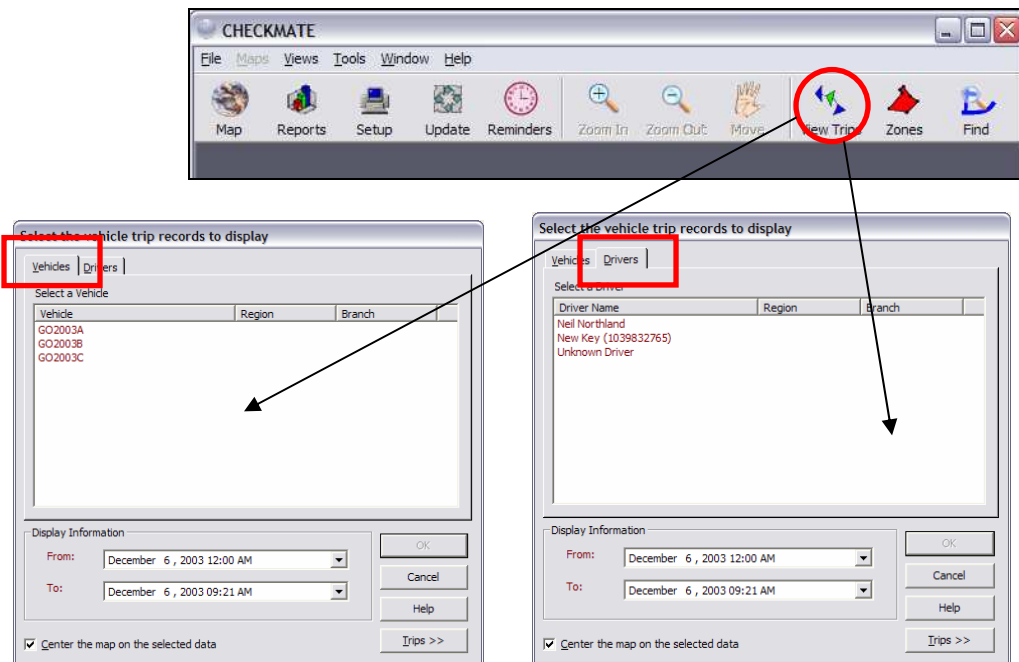
## 2. GETTING STARTED WITH REPORTING SOLUTIONS

### Reports and Trips

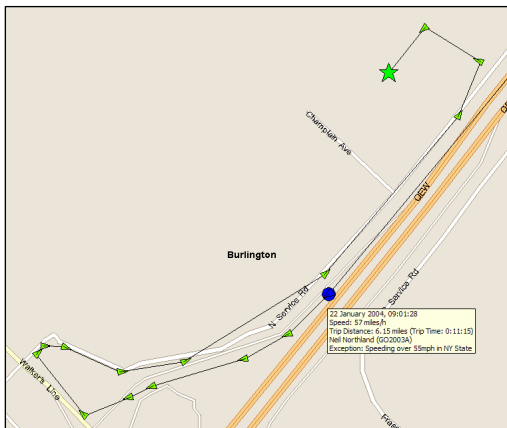
GEOTAB Reports are easy to generate and are productivity-focused. By setting up your fleet with driver and vehicle entries, driving exceptions, customer and territory zones, GEOTAB reports do the rest of the work for you. Select from Summary Rollup reports to detailed reports showing precisely where activity takes place.

### Viewing Trips On a Map

Click the View Trips Icon at the top of the page. The default map view will open and you will be prompted to choose either a vehicle or driver and a date period.



You will see a list of Vehicles and Drivers.



If you see the serialized ID's of the vehicle and drivers then you need to go and rename the drivers and vehicles. If you assign unique driver keys then click the Drivers tab else click the Vehicle tab. Select the From Date and the To Date by typing in the date or clicking the drop down arrow next to the date. **Now Click OK to display your trips on a map!**

Once you click OK, the selected data range will be displayed on the map.

4 default symbols are preset in CHECKMATE: Normal log records, Stop Points, Customer

Stop Points and End of Data Markers.

**NEW** to CHECKMATE is our compatibility with Microsoft MapPoint North America or European Editions as well as imported vector-based maps used in all global markets.

Choose the mapping platform that is right for you.

**Here are the primary CHECKMATE reports for your everyday use.**

<b>Activity</b>	CHECKMATE Activity Report summarizes your fleet activity per vehicle. The Fleet Manager specifies the reporting period as well as the vehicles or drivers to be examined. The report shows Driving Time, Idling Time, Customer Time and Distance Traveled during the period. The Report is provided in MS Excel for graphing.
<b>Auxiliary Status</b>	CHECKMATE Activity Report summarizes your fleet activity per vehicle. The Fleet Manager specifies the reporting period as well as the vehicles or drivers to be examined. The report shows Driving Time, Idling Time, Customer Time and Distance Traveled during the period. The Report is provided in MS Excel for graphing.
<b>Customer Visits</b>	CHECKMATE Customer Visits Report quickly summarizes customer visits and the length of time spent at each customer site. One of the most effective tools to improve revenue from field operations is to monitor customer time. The report is useful for Proof of Activity and automatic Call Reporting.
<b>Exceptions</b>	Managing risk and liability within a fleet starts with identifying the rules. CHECKMATE allows Fleet Managers to create rules around vehicle use, territory zone use and time of day. The Exception summary allows managers to quickly focus their attention on broken rules. In minutes management is taking action.
<b>GEOTAB Navigator</b>	GEOTAB Navigator provides you with fleet information at a glance screen. Simply click on the vehicle, timeframe and desired data and the information is extracted from the database quickly. By changing a variable, the information is seamlessly updated.
<b>Risk Management</b>	Reducing risk is key to fleets that self-insure some aspect of collision or liability. Through historical recording of past claims, fleet or risk management staff can focus on areas to be monitored for driving behavior modification. The summary report highlights the key areas for reduced risk.
<b>Trips List</b>	For automated time and attendance or proof of activity, the CHECKMATE Trips List report quickly summarizes trips taken. Driver, vehicle, time of departure, arrival and the approximate address of where the stop happened are recorded.

## Activity

CHECKMATE Activity Report summarizes your fleet activity per vehicle. The Fleet Manager specifies the reporting period as well as the vehicles or drivers to be examined. The report shows Driving Time, Idling Time, Customer Time and Distance Traveled during the period. The Report is provided in MS Excel for graphing.

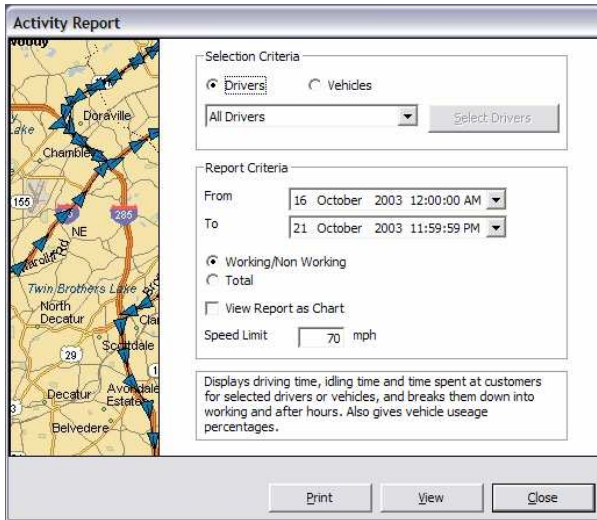
### ACTIVITY REPORT

REPORT PERIOD: 2/2/2003 TO 2/8/2003 11:59:59 PM

REPORT DATE: 6/9/2003

REPORT VIEW: DETAILED

Vehicle	WORKING HOURS				AFTER HOURS			
	Driving Time	Idling Time	Customer Time	Distance	Driving Time	Idling Time	Customer Time	Distance
94364	0:15:53:35	0:00:18:18	1:04:18:06	308	0:00:24:01	0:00:00:00	0:11:13:09	9
94368	0:13:15:53	0:00:54:41	0:06:05:32	258	0:01:02:21	0:00:18:24	0:00:42:51	19
94371	0:06:49:56	0:00:00:46	0:16:27:49	143	0:00:00:00	0:00:00:22	0:06:00:00	0
94374	1:00:58:32	0:00:42:58	0:10:57:14	540	0:00:00:00	0:00:00:00	0:00:00:00	0
94381	0:16:34:14	0:00:19:46	0:02:54:46	243	0:00:42:50	0:00:00:00	0:00:30:04	14
94405	0:12:50:59	0:00:19:05	1:04:17:03	331	0:00:10:14	0:00:00:00	0:16:59:59	7
94409	0:22:31:14	0:00:02:03	0:10:28:49	502	0:00:00:00	0:00:00:00	0:00:00:00	0
95914	0:20:39:11	0:00:20:47	0:18:08:45	578	0:00:02:30	0:00:00:00	0:06:00:00	1
96482	0:19:39:53	0:00:52:20	0:03:21:23	496	0:00:58:50	0:00:00:00	0:00:00:00	41
96849	0:22:46:23	0:00:30:47	0:23:26:19	435	0:00:00:00	0:00:00:00	0:06:00:00	0
96964	0:03:46:26	0:00:09:44	0:21:48:22	76	0:00:00:00	0:00:00:00	0:16:59:59	0
97333	0:03:33:56	0:00:00:24	0:08:26:04	122	0:01:02:24	0:00:00:00	0:00:00:00	25
97342	0:14:22:39	0:00:31:10	1:14:57:45	294	0:00:00:00	0:00:00:00	2:12:59:55	0
98142	0:14:14:52	0:00:36:46	1:15:04:07	400	0:00:00:00	0:00:00:00	0:16:59:59	0
98154	0:11:17:16	0:00:16:54	1:14:20:58	207	0:00:00:00	0:00:00:00	2:01:59:56	0
98155	0:15:28:36	0:00:23:00	1:12:59:06	398	0:00:29:20	0:00:00:00	0:16:59:59	11
99381	0:17:38:53	0:00:22:11	0:02:59:01	420	0:00:13:21	0:00:00:00	0:00:00:00	5
99860	0:07:16:10	0:00:55:22	0:23:32:02	152	0:00:00:00	0:00:00:00	1:03:59:58	0
<b>TOTAL</b>	<b>10:23:38:38</b>	<b>0:07:37:02</b>	<b>14:22:33:11</b>	<b>5903</b>	<b>0:05:05:51</b>	<b>0:00:18:46</b>	<b>9:21:25:49</b>	<b>132</b>



### How to generate the Activity Report:

Reports Menu

> Activity

> Select Drivers or Vehicles

> Select date period

> Select Total or Working/Non-Working Hours, view as chart and speed limit indicator

> Click View or Print

**Auxiliary Status**

CHECKMATE Activity Report summarizes your fleet activity per vehicle. The Fleet Manager specifies the reporting period as well as the vehicles or drivers to be examined. The report shows Driving Time, Idling Time, Customer Time and Distance Traveled during the period. The Report is provided in MS Excel for graphing.

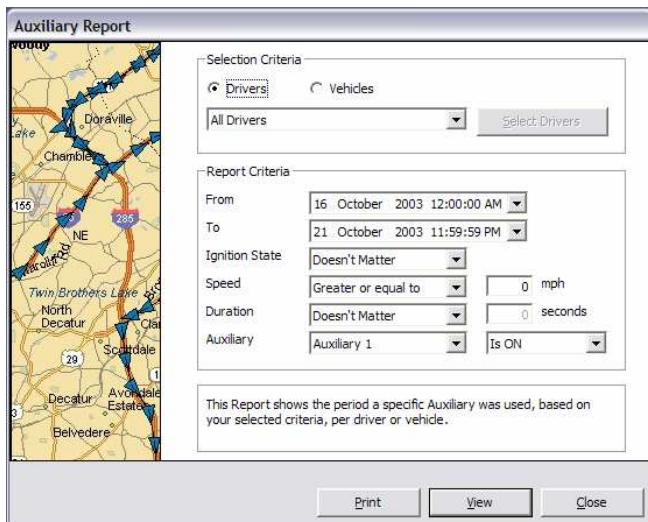
**AUXILIARY REPORT**

REPORT DATE: 5/12/2003 TO 5/12/2003 11:59:59 PM

REPORT DATE: 6/9/2003

REPORT VIEW: Speed >= 0 / Duration >= 0 / Using Auxiliary 1

Vehicle	Driver	From	To	Time Period
Service 1042	990902	5/12/2003 7:59	5/12/2003 8:06	0:00:06:19
Service 1042	990902	5/12/2003 8:20	5/12/2003 8:24	0:00:03:57
Service 1042	990902	5/12/2003 8:26	5/12/2003 8:34	0:00:08:32
Service 1042	990902	5/12/2003 8:55	5/12/2003 9:09	0:00:14:49
Service 1042	990902	5/12/2003 9:13	5/12/2003 9:53	0:00:39:59
Service 1042	990902	5/12/2003 10:00	5/12/2003 10:05	0:00:04:53
Service 1042	990902	5/12/2003 10:18	5/12/2003 10:30	0:00:11:41
Service 1042	990902	5/12/2003 10:54	5/12/2003 11:18	0:00:23:29
Service 1042	990902	5/12/2003 11:26	5/12/2003 13:45	0:02:18:19
Service 1042	990902	5/12/2003 13:51	5/12/2003 14:16	0:00:25:20
Service 1042	990902	5/12/2003 14:19	5/12/2003 14:38	0:00:18:29
Service 1042	990902	5/12/2003 15:17	5/12/2003 15:21	0:00:03:18
Service 1042	990902	5/12/2003 15:26	5/13/2003 7:33	0:16:07:05
<b>Total for Service 1042</b>				<b>0:21:06:10</b>



**How to generate the Auxiliary Report:**

- Reports Menu
- > Auxiliary Report
- > Select Drivers or Vehicles
- > Select date period
- > Select Ignition State
- > Select Speed State
- > Select Duration
- > Select which of 3 auxiliaries are being

reported

> Click View or Print

## Customer Visits

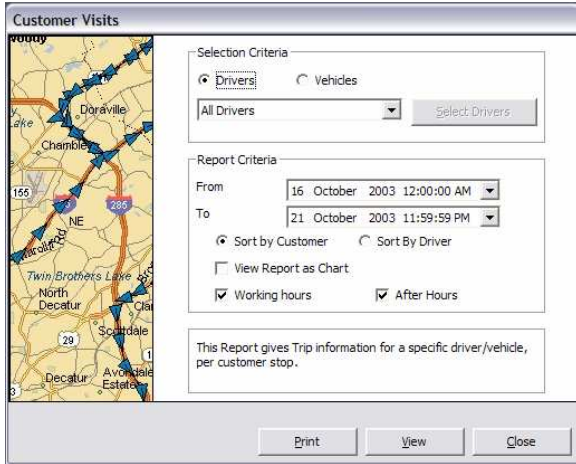
CHECKMATE Customer Visits Report quickly summarizes customer visits and the length of time spent at each customer site. One of the most effective tools to improve revenue from field operations is to monitor customer time. The report is useful for Proof of Activity and automatic Call Reporting.

### CUSTOMER VISITS REPORT

REPORT PERIOD: 1/1/2003 TO 1/31/2003 11:59:59 PM

REPORT DATE: 6/9/2003

Driver	Arrival Time	Stopped Time	Departure Time
<b>Korry Greenville Oh</b>			
990902	14 Jan 03, 08:33:34	0:00:22:21	14 Jan 03, 08:55:55
Admin 1	23 Jan 03, 12:40:33	0:00:10:38	23 Jan 03, 12:51:11
Total for Korry Greenville Oh:		0:00:32:59	
<b>Custom Versailles Oh</b>			
990902	14 Jan 03, 09:37:52	0:00:31:15	14 Jan 03, 10:09:07
Admin 1	23 Jan 03, 13:14:48	0:00:23:27	23 Jan 03, 13:38:15
Total for Custom Versailles Oh:		0:00:54:42	
<b>Locker, Madison Oh</b>			
990902	14 Jan 03, 10:38:58	0:00:10:37	14 Jan 03, 10:49:35
Total for Locker, Madison Oh:		0:00:10:37	
<b>Kroger ## 0914G Dayton Oh</b>			
990902	14 Jan 03, 06:10:48	0:00:19:24	14 Jan 03, 06:30:12
Total for Kroger ## 0914G Dayton Oh:		0:00:19:24	
<b>Total for B-3217</b>		<b>0:01:57:42</b>	



### How to generate the Customer Visits Report:

Reports Menu

> Customer Visits Report

> Select Drivers or Vehicles

> Select date period

> Select to sort by customer or driver/vehicle and whether to view report as a chart

> Select Working and / or After Hours

> Click View or Print

> Select zone combinations (include / exclude specific zones or zone types)



## Exceptions

Managing risk and liability within a fleet starts with identifying the rules. CHECKMATE allows Fleet Managers to create rules around vehicle use, territory zone use and time of day. The Exception summary allows managers to quickly focus their attention on broken rules. In minutes management is taking action.

### EXCEPTIONS REPORT

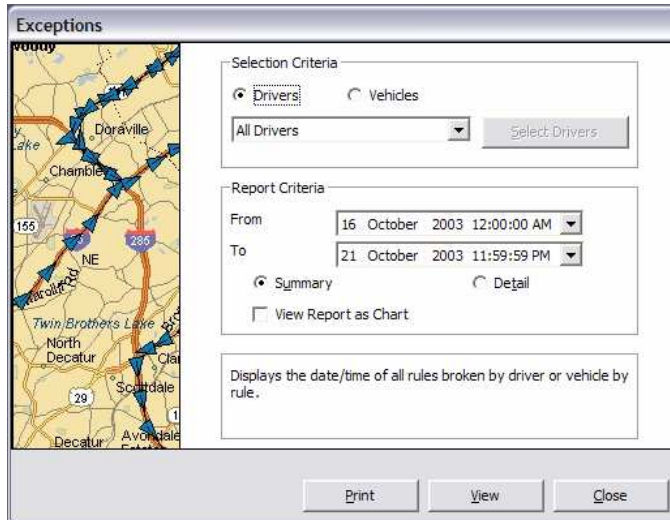
REPORT PERIOD: 9/18/2003 TO 9/23/2003 11:59:59 PM

REPORT DATE: 11/27/2003

REPORT VIEW: Summary

Driver	# of Incidents	Period
<b>JOHN PETERS</b>		
Idling over 5 minutes	18	
Over 75 mph	2	0:00:00:15
<b>NEIL NORTHLAND</b>		
Idling over 5 minutes	3	

[End Of Report]



### How to generate the Exceptions Report:

Reports Menu

> Exceptions Report

> Select Drivers or Vehicles

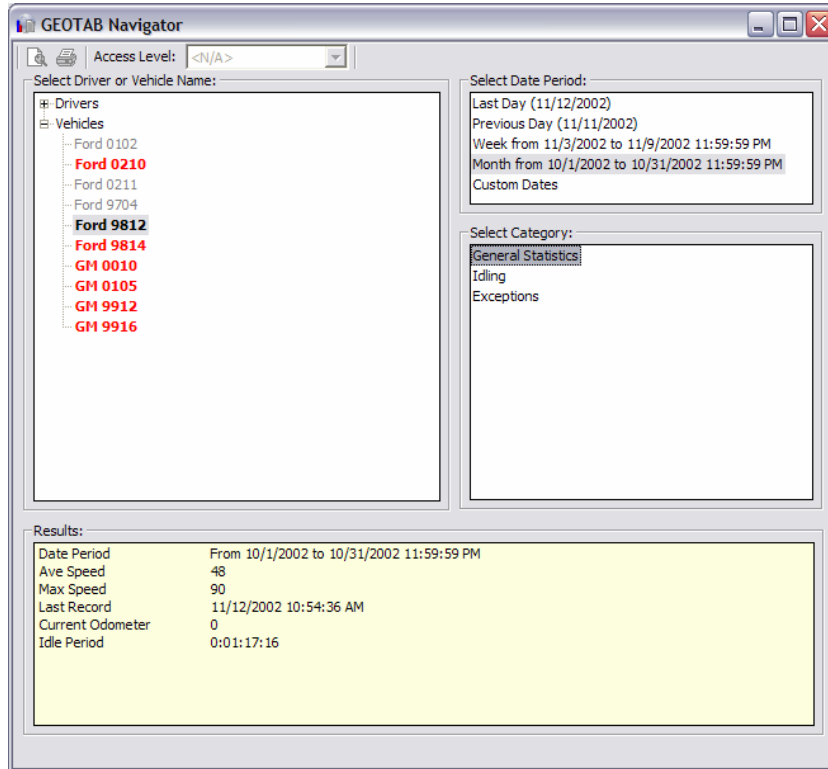
> Select date period

> Select Summary Information or Detailed Information and chart options

> Click View or Print

## GEOTAB Navigator

GEOTAB Navigator provides you with fleet information at a glance screen. Simply click on the vehicle, timeframe and desired data and the information is extracted from the database quickly. By changing a variable, the information is seamlessly updated.



### How to generate the GEOTAB Navigator Report:

Reports Menu

> GEOTAB Navigator

> Select Driver or Vehicle Name

> Select the Date Period (last day of download, previous day, last week or last month are default periods, or click Custom Dates for the reporting period required)

> Select Category (General Statistics, Idling or Exception Summaries)

> Select Print to send directly to printer or View in MS Excel by clicking on the Printer or Viewer icon in the upper left hand corner of the GEOTAB NAVIGATOR

## Risk Management

Reducing risk is key to fleets that self-insure some aspect of collision or liability. Through historical recording of past claims, fleet or risk management staff can focus on areas to be monitored for driving behavior modification. The summary report highlights the key areas for reduced risk.

### RISK ANALYSIS REPORT

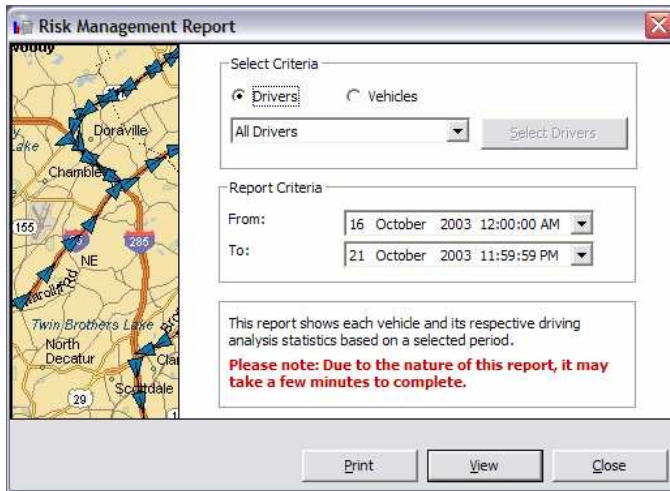
REPORT PERIOD: 2/2/2003 TO 2/8/2003 5:07:50 PM

REPORT DATE: 6/9/2003

REPORT VIEW: DETAILED

Vehicle	Max MPH			Ave. Speed (mph)	Stop Length (Mins)						After Hours Usage	Idling Time (d:h:m:s)	Idle Count > 5 min	Total miles	Total Stops	Vehicle Last Used
	> 70	> 80	> 90		< 10	> 10	> 20	> 30	> 40	> 50						
94364				25	8	17	16	5	13	58	0:00:18:18	2	317	59	2/26/2003 7:03	
94368				21	2	6	19	19	17	28	89	0:01:13:05	3	278	91	2/25/2003 7:16
94371				24		2	11	6	3	5	27	0:00:01:08		143	27	2/4/2003 13:22
94374				26	1	16	48	14	2	23	104	0:00:42:58	3	540	104	2/25/2003 17:44
94381				20	1	8	29	21	16	20	94	0:00:19:46		256	95	2/17/2003 13:34
94405				26		32	18	11	3	11	75	0:00:19:05		338	75	2/24/2003 13:20
95914				30	1	6	3	18	4	23	54	0:00:20:47	1	579	55	2/26/2003 8:18
96482				30			3	2	2	31	37	0:00:52:20	5	537	38	2/26/2003 9:00
96849				24	2	15	20	13	12	17	79	0:00:30:47	1	435	79	2/25/2003 17:01
96964				21	1	25	4	2	1	3	36	0:00:09:44	1	76	36	2/24/2003 12:10
97333				33						8	7	0:00:00:24		147	8	2/26/2003 6:56
97342				23	3	11	25	17	13	15	84	0:00:31:10	2	294	84	2/21/2003 15:17
98142				21	2	27	18	3	3	12	65	0:00:36:46	1	400	65	2/25/2003 17:18
98154				20	4	38	27	9	4	12	94	0:00:16:54		207	94	2/25/2003 14:28
98155				26	2	22	21	9	3	17	73	0:00:23:00	1	409	74	2/25/2003 17:11
99381	1			25	3	17	28	20	13	19	98	0:00:22:11	2	426	100	2/24/2003 18:31
<b>TOTALS:</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>20</b>	<b>22</b>	<b>258</b>	<b>347</b>	<b>200</b>	<b>116</b>	<b>281</b>	<b>1,215</b>	<b>0:07:55:48</b>	<b>24</b>	<b>6,036</b>	<b>1,225</b>	

Risk reduction comes from knowledge of how your fleet actually operated in the field. The Risk Management Report covers Speed in 3 increments, Average Speed, Stop Length in 6 time intervals, After Hours Use, Idle Time, Idle Count Greater Than 5 Minutes, Total Distance Traveled, Total Number of Stops and the Last Date of Use.



### How to generate the Risk Management Report

- Reports Menu
- > Risk Management
- > Select Drivers or Vehicles
- > Choose date period
- > Click View or Print

## Trips List

For automated time and attendance or proof of activity, the CHECKMATE Trips List report quickly summarizes trips taken. Driver, vehicle, time of departure, arrival and the approximate address of where the stop happened are recorded.

### TRIPS LIST

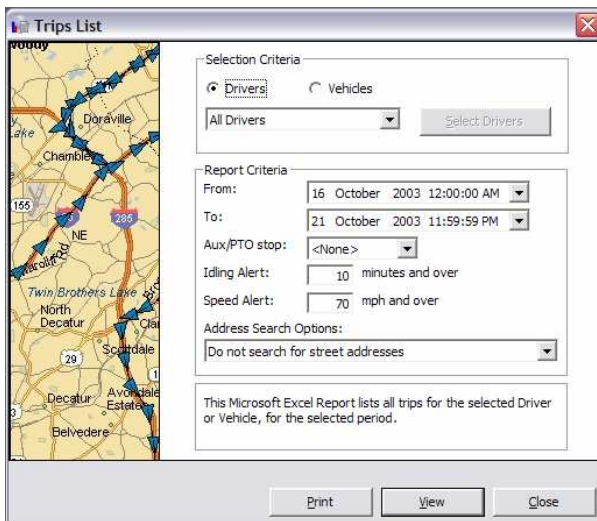
FROM 1/1/2003 TO 6/1/2003 11:59:59 PM

REPORT DATE: 6/1/2003

Vehicle	Driver	Departure Time	Driving Time	Arrival Time	Location	Trip	Stopped Time	Ave. Speed	Max. Speed	Odometer	Idling
<b>VEHICLE</b>											

Automated time & attendance is now possible with the GEOTAB Trips List Report.

Call Reports and time or distance-based compensation are automated.



### How to generate the Trips List Report.

Reports Menu

> Trips List

> Select Drivers or Vehicles

> Select date period

> Choose idling & speeding alerts

> Select Address Search options if you want to display the approximate street address; the Customer Zone name of where the vehicle stopped; or both

> Click View or Print