

Geotab Checkmate Zones

Updated: 13-Nov-11

Contents

Zones	1
Zone Features	1
Creating a Zone Manually	2
How to import zones into Checkmate.....	5
1) What to do if your data is not in Excel .XLS format:	5
2) Preparing for the Zone Import:.....	6
Open Checkmate and use the Zone Import Wizard	7
Additional Steps if Using Groups.....	9
Applying New Zones to Historical Trips:.....	9
Select Rules	9
Select "Recalculate Data" in bottom left corner	9
Select "Apply the Changes to Historic Trips or Engine Data"	10
Select which vehicles to use in the recalculation of the historic trip data	10

Zones

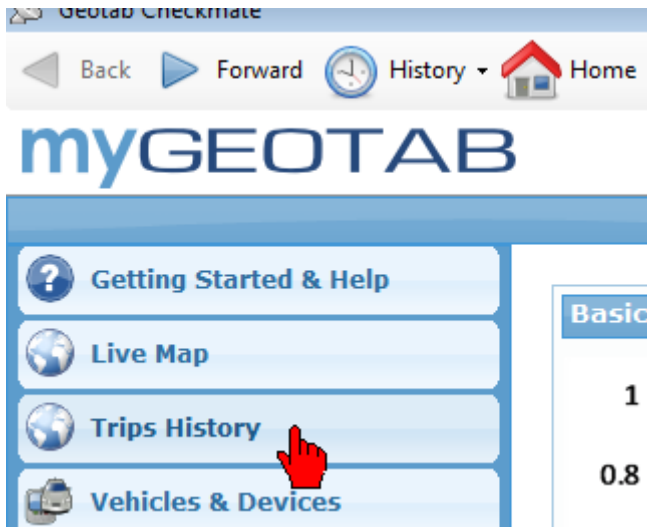
Zone Features

- Creation of zone on Map
 - Create zone on the satellite view or street map
 - Create zone from address (typed in the search bar)
- Zone shape/size options
 - No restriction on the shape or size of the zone (multi-point polygon)
- Number of zone allowed
 - Unlimited
- Ability to move a zone once it is on the map
 - Highlight the zone, right click, select 'move' and drag it to the new location
- Zone Import Function
 - Import from any Excel spreadsheet – must be 97-2007 xls.
- Action when vehicle enters/exits zone
 - Automatically logs vehicle entry
- Zones visible/organized by branch or region
- Separate zone by type
 - A variety of zone types are prepopulated in a list or the user can create custom zone types with user defined rules for the new zones
- Ability to Calculate Time in zone
 - Calculate time from arrival to departure regardless of vehicle status
- Time spent in the zone if no 'stop' occurs
 - Calculates time spent in the zone idle stop, hard stop, or moving in the zone
 - must not be moving for 200 seconds or greater for vehicle to be logged in a zone.
- Exceptions to Zone rules

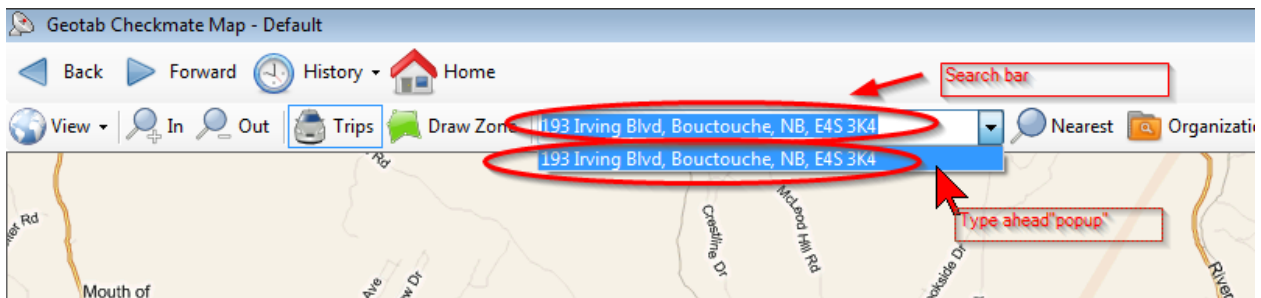
- Email and Pop up alerts can be set to notify of entry or departure in zone

Creating a Zone Manually

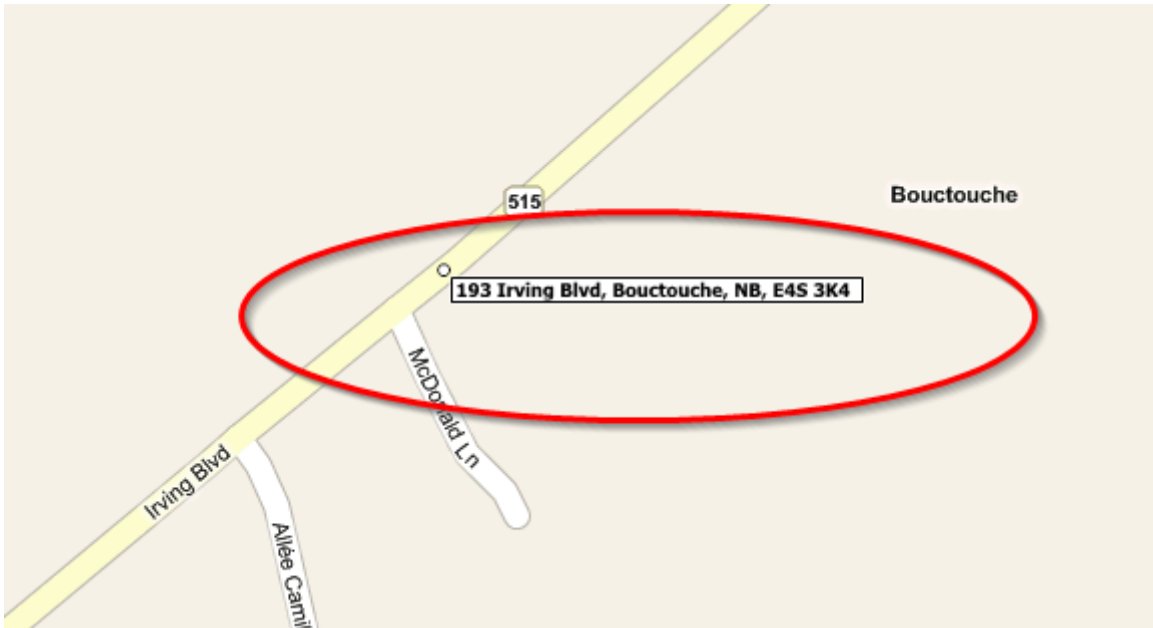
- Go to “Trips History” map



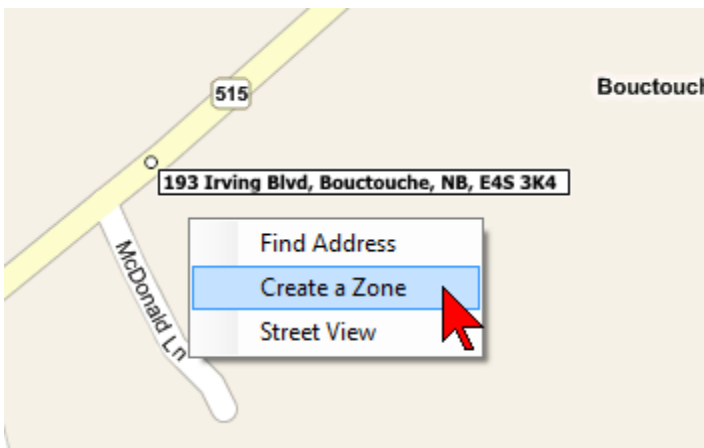
- Enter address in search bar and Select address found in “Type Ahead Pop-Up”



- Map is repositioned to found address



- Right click “create zone”

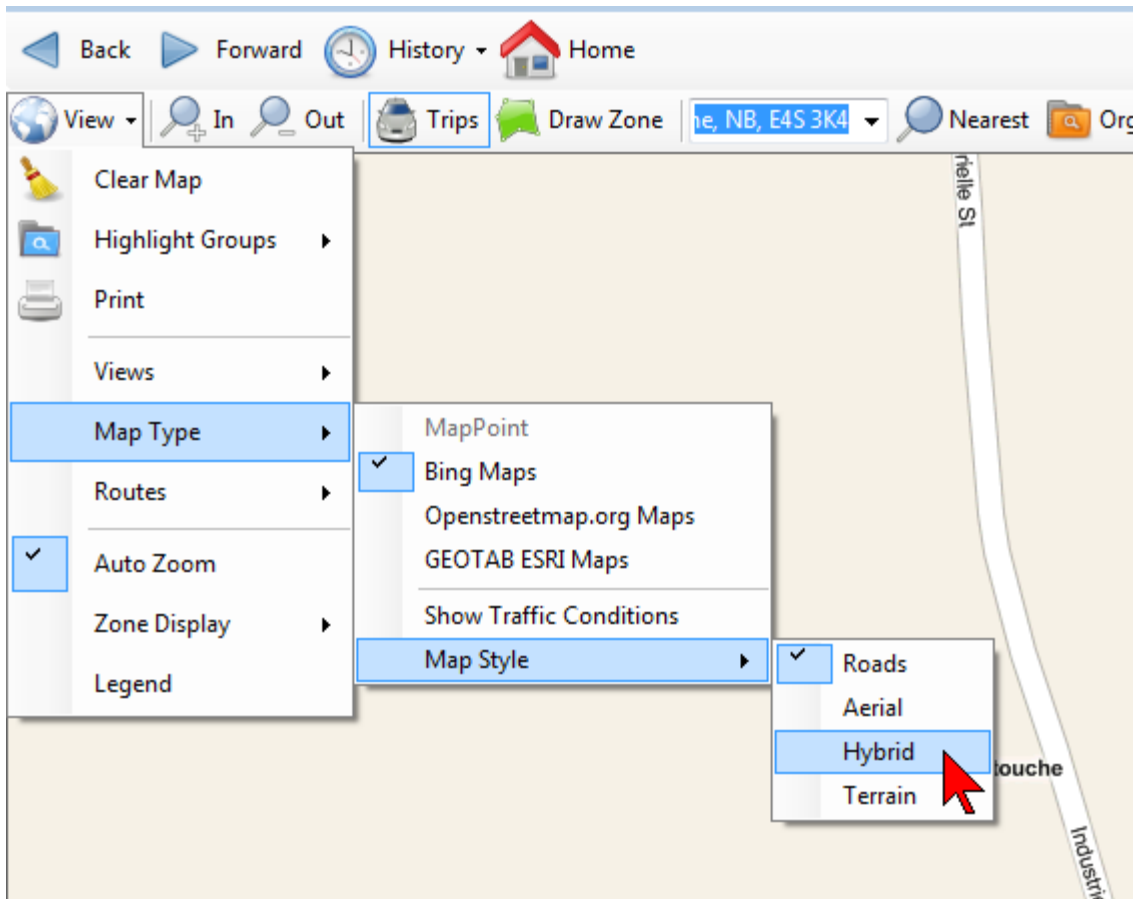


- Enter Description
- Add to Groups (if Groups are used)
- Check applicable selection of “Zone Type” ie. “Customer” “Office” etc.
- Finish by selecting “OK”

The screenshot shows the 'Zone Editor' application window. The title bar reads 'Zone Editor'. Below the title bar is a navigation bar with 'Back', 'Forward', 'History', and 'Home' buttons. The main content area has a header with a green polygon icon and the text: 'Zone Editor. Zones are defined by clicking a series of points around an area on the map. The resulting polygon is used when analysing trip data. Select the appropriate zone type.'

The 'Groups' tab is selected. The 'Description' field contains 'Irving Blvd LCBO'. The 'Comment' field is empty. The 'Type' section has four checked options: 'Show zone on map', 'Show when stopped inside zone', 'Add as Customer time in reports', and 'Add as Office/Depot time in reports'. The 'Add as Home time in reports' option is unchecked. The 'Fill' section shows a color palette with a red square selected, a 'More...' button, and a 'Transparency' slider. The 'Use default colour for zone type' checkbox is checked. The 'Zone expires' dropdown is set to 'Never'. The 'OK' button is highlighted in the bottom right corner.

Change to Hybrid View to verify that zone is completely covering area



How to import zones into Checkmate

The data which you'll import into Checkmate must be in Excel XLS format.

If your data is in Excel XLS format, then proceed to step #2.

What to do if your data is not in Excel .XLS format:

1. I.e. If raw data is in CSV format
2. Open files in in Excel - Delimited, can leave tab as checked, can leave text qualifier to "double-quote"
3. If there are quote surrounding the fields,
Use the "Find & Replace" command. - cleans in an instant. (Edit-->Replace and then put your undesired quote in the "Find what" box and leave the "Replace with" box empty
4. Add a description qualifier or reference of some kind to column #3 – may not be necessary if all zones are going to be part of the same group with the same colour.
5. **SAVE AS Excel XLS file.**

Preparing for the Zone Import:

1. Create group in Checkmate to receive zones (create groups of zones if you are going to have many zones and you want to keep them separated, ie. group of customers, group of suppliers, Tim Horton's group, etc.)
2. Create Excel .XLS file with company names and addresses (use field name as first line header)
- format in this order:
3. Column #1: Co name,
4. Columns #2: address (no suite #): street,city,prov,postal code,
5. Columns #3 (optional): any description qualifier or reference of some kind

ie.:

The data must be in this format, to be in proper format for import:

Company name (client name)	address
ABC Company	street, city, prov, postal code

Use 2 columns only. The 2nd column – address, must be shown as comma separated as illustrated. No suite #'s – just street, city, prov, postal code

How to get the data into two columns:

If street, city, prov, postal code are separate columns, use Excel concatenate function in a new column to "join" (concatenate) the data in a new column

ie. if data is in this format:

C	D	E	F
Street	City	Province	Postal code
123 Go Way	Toronto	ON	M2J 3Y2

Using the Excel concatenate function in a new column to join the 4 separate columns, ie in the new cell type:

=CONCATENATE((C2&", "&D2&" "&E2&" "&F2))

address
123 Go Way,Toronto, Ontario, M2J 3Y2

Tables		Illustrations		Charts		Sparklines		Filter		Links		Text	
G2		=CONCATENATE((C2&","&D2&" "&E2&" "&F2))											
A		B		C		D		E		F		G	
Company Name		Address		Street		City		Prov		Postal			
2		401 Dixie Hyundai		5515 Ambler Drive		Mississauga		ON		L4W 4N3		5515 Ambler Drive, Mississauga ON L4W 4N3	
3		Airport Kia		3295 Derry Road E.		Mississauga		ON		L4T 1A8			
4		Airport		415 Rexdale Blvd		Rexdale		ON		M9W 6P8			
5		Applew		3000 Wood		Mississauga		ON		L5L 2R4			
6		Attrell Hyundai		100 Canam Cres		Brampton		ON		L7A 1A9			
7		Attrell Toyota		110 Canam Cres		Brampton		ON		L7A 1A9			
8		Avante Mazda		10414 Yonge St.		Richmond Hill		ON		L4C 3C3			
9		Bolton Honda		65 Pillsworth Rd.		Bolton		ON		L7E 4E9			
10		Bolton Toyota*		12050 Albion Vaugh Rd		Bolton		ON		L7E 1S7			
11		Brampton Chrysler		190 Canam Crescent		Brampton		ON		L7A 1A9			
12		Classic Honda		30 Van Kirk Dr		Brampton		ON		L7A 2Y4			
13		Direct Mazda		2290 Battleford Road		Mississauga		ON		L5N 3K6			
14		Dixie Toyota*		5500 Dixie Rd		Mississauga		ON		L4W 4N3			

File Home Insert Page Layout Formulas Data Review View Acrobat

Cut Copy Paste Paste Values

123 123% 123

Other Paste Options

Paste Special...

B		C		D		E		F		G	
Address		Street		City		Prov		Postal			
5515 Ambler Drive		Mississauga		ON		L4W 4N3		5515 Ambler Drive, Mississauga ON L4W 4N3			
3295 Derry Road E.		Mississauga		ON		L4T 1A8		3295 Derry Road E., Mississauga ON L4T 1A8			
415 Rexdale Blvd		Rexdale		ON		M9W 6P8		415 Rexdale Blvd, Rexdale ON M9W 6P8			
3000 Woodchester Blvd		Mississauga		ON		L5L 2R4		3000 Woodchester Blvd, Mississauga ON L5L 2R4			
100 Canam Cres		Brampton		ON		L7A 1A9		100 Canam Cres, Brampton ON L7A 1A9			
110 Canam Cres		Brampton		ON		L7A 1A9		110 Canam Cres, Brampton ON L7A 1A9			
10414 Yonge St.		Richmond Hill		ON		L4C 3C3		10414 Yonge St., Richmond Hill ON L4C 3C3			
65 Pillsworth Rd.		Bolton		ON		L7E 4E9		65 Pillsworth Rd., Bolton ON L7E 4E9			
12050 Albion Vaugh Rd		Bolton		ON		L7E 1S7		12050 Albion Vaugh Rd, Bolton ON L7E 1S7			
190 Canam Crescent		Brampton		ON		L7A 1A9		190 Canam Crescent, Brampton ON L7A 1A9			
30 Van Kirk Dr		Brampton		ON		L7A 2Y4		30 Van Kirk Dr, Brampton ON L7A 2Y4			
2290 Battleford Road		Mississauga		ON		L5N 3K6		2290 Battleford Road, Mississauga ON L5N 3K6			
5500 Dixie Rd		Mississauga		ON		L4W 4N3		5500 Dixie Rd, Mississauga ON L4W 4N3			
3120 Steeles Avenue East		Markham		ON		L3R 1G9		3120 Steeles Avenue East, Markham ON L3R 1G9			
3300 Steeles Avenue East		Markham		ON		L3R 1G9		3300 Steeles Avenue East, Markham ON L3R 1G9			
2365 Motorway Blvd		Mississauga		ON		L5L 2M4		2365 Motorway Blvd, Mississauga ON L5L 2M4			
2360 Motorway Blvd		Mississauga		ON		L5L 1X3		2360 Motorway Blvd, Mississauga ON L5L 1X3			

Open Checkmate and use the Zone Import Wizard

1. Create a new zone type if necessary, ie. Tim Horton's
2. Create group for the zones, ie. although customer is already a zone type, it may be necessary to separate customers into different groups ie, Plumbing Customers or HVAC Customers etc
3. Open zone import wizard

a. Home Page >Customers and Zones > Zones > Import Zones

4. Open the .xls workseet
5. Select/deselect the "first row contains headings & the file contains street address" – confirm data looks OK in preview window

- The first row contains headings
- The file contains street addresses
- The file contains coordinates
- Include reference column

Example:

Tim's	45.816239	-64.20447	Tim Hortons ...
-------	-----------	-----------	-----------------

6. Make sure appropriate checkboxes are selected

Show when stopped inside zone
 Add as Customer time in reports
 Add as Office/Depot time in reports
 Add as Home time in reports
 Tim's

330 meters in width and length

- a. *check "Add as customer time in report" or "Add as time in Tim Horton's" , then "uncheck customer time"
- b. *check "Show Zone on Map" if zone is to be default viewed on map, otherwise if many zones, ie, like Tim Horton's do no check this option
- c. *check "Show when stopped in Zone"
- d. *Change zone size to larger from 200 to least 350
- e. *Select the zone colour

7. Select the group, if not added to a group, a large list of customers will flood the organizational level

Imported zones will belong to the following groups:

Group
Tim's

8. Check to ensure you have completed all the steps properly before you select import:

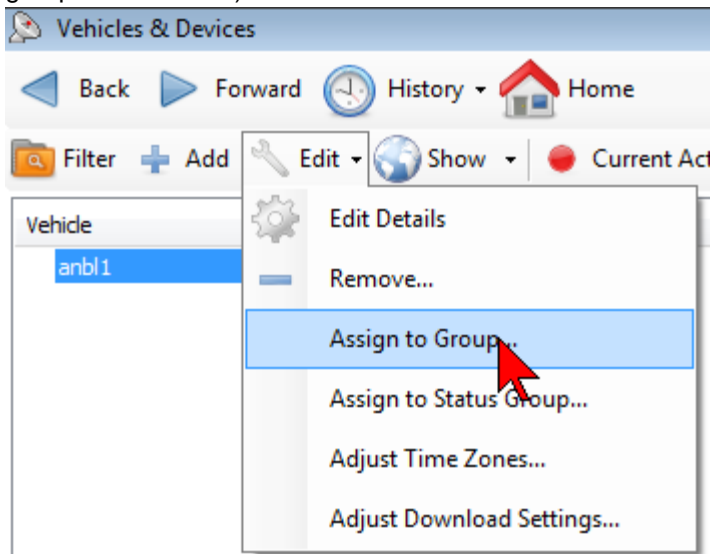
Before you begin the zone import, please verify your settings. If you need to change any settings, please click the Back button and make the changes. When you are satisfied with all the settings, click Next to begin the Zone Import.

```
| Import File: C:\Users\Ellie9750\Documents\GTC Offline\POI Files\POI
Files for NB\Tim_Hortons-CA-NB-New_Brunswick.xls
> Zone Type: Tim's
> Zone Size: 330
> Normally Visible: False
> Assigned Groups: Tim's
```

9. look at the zones on the map in hybrid (satellite) view to ensure that the zones completely cover the property that you wish to zone

Additional Steps if Using Groups

10. After the zones are imported, edit Vehicles and Devices and add the vehicles to the group created for the zone
11. Assign the vehicles or the group of vehicles to be a member of the group of zones (if you created a group for the zones)



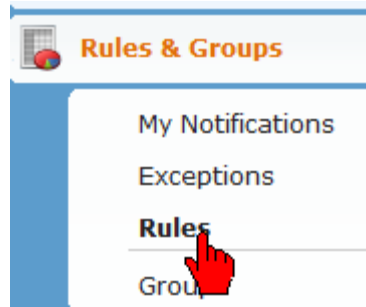
12.

Applying New Zones to Historical Trips:

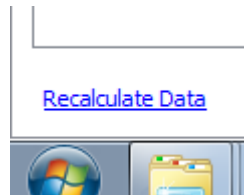
Recalculate the trips history to include data for the newly created zones

13. If adding the zones after the trips have already been recorded and you want to show the historical trips to the zones, then you must recalculate the data

Select Rules



Select "Recalculate Data" *in bottom left corner*



Select "Apply the Changes to Historic Trips or Engine Data"

Please choose one of the following options:

- Apply the changes to exception rule or Zone only to new trips or engine data.
- Apply the changes to historic trips or engine data.
 - Do not recalculate trips (recommended) [When to use this option](#)

From which date would you like to apply the changes?

- Apply the changes to data starting on this date:

21-Dec-10

- Do not limit my changes by date

Warning: Choosing this option could significantly increase the amo

Select which vehicles to use in the recalculation of the historic trip data

Process Data Wizard X Notifications X


Select Devices
Please select the devices that t



+ Add Remove



Add
Device

Select I
Please se



+ Add Remove

Device

-  SM1
-  SM2