Geotab Checkmate Zones

**Updated: 13-Nov-11**

Contents

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.
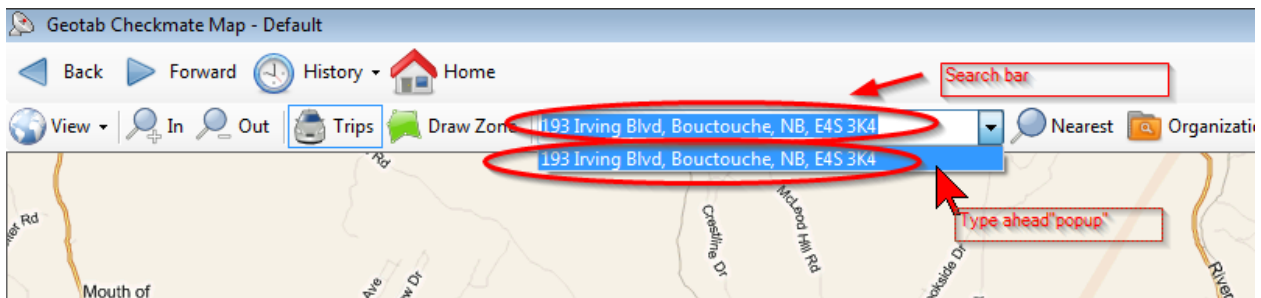- Exceptions to Zone rules

o   Email and Pop up alerts can be set to notify of entry or departure in zone
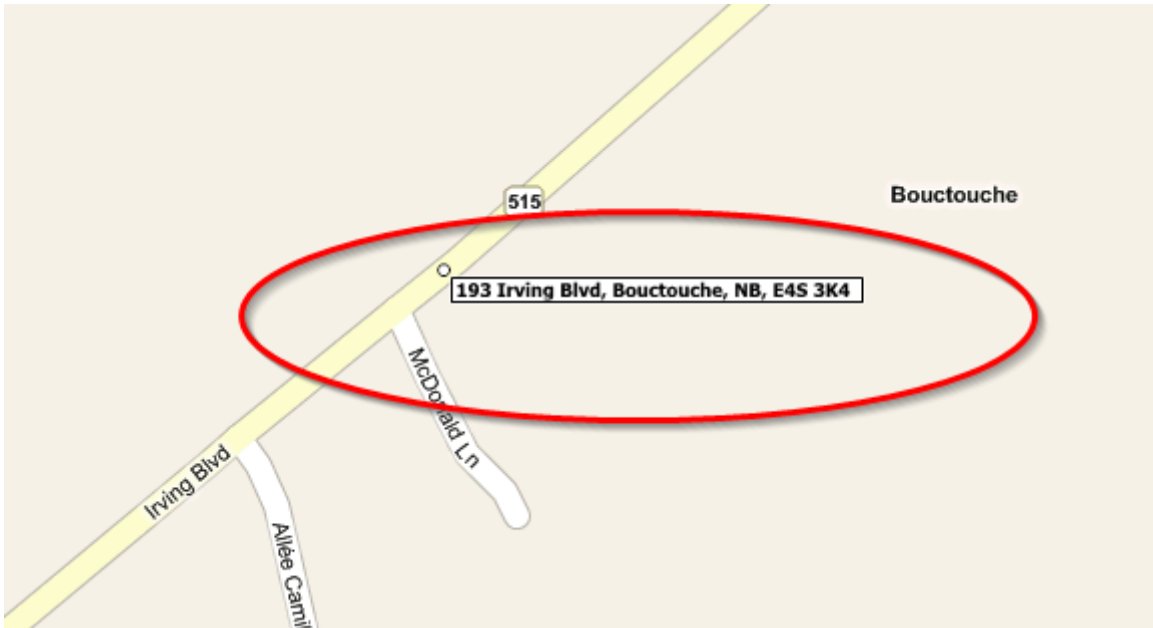
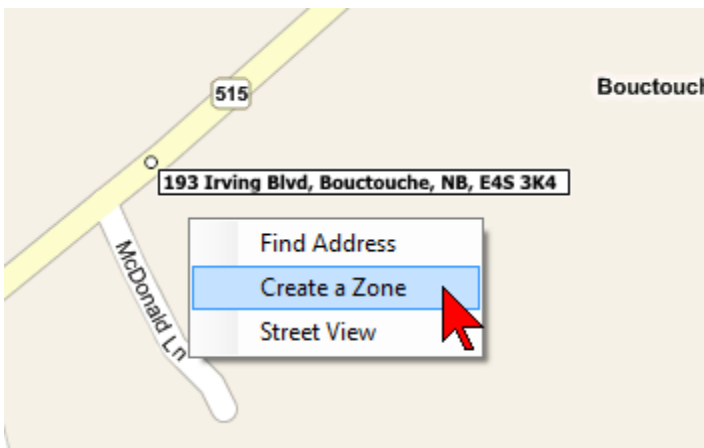## Creating a Zone Manually

- **Go to "Trips History" map**
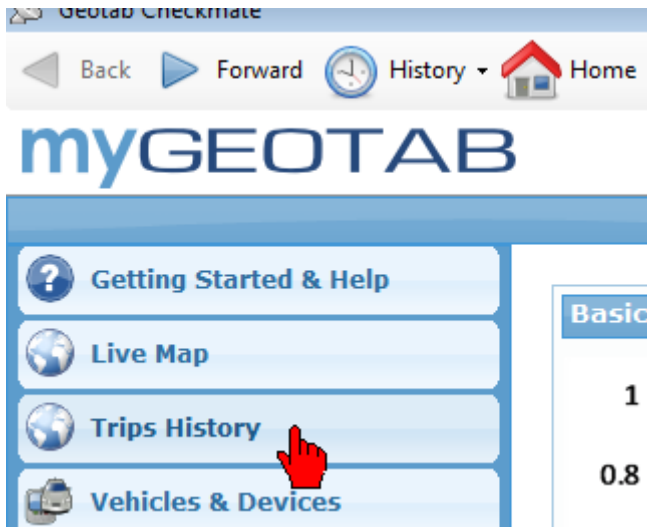
- **Enter address in search bar and Select address found in "Type Ahead Pop-Up"**

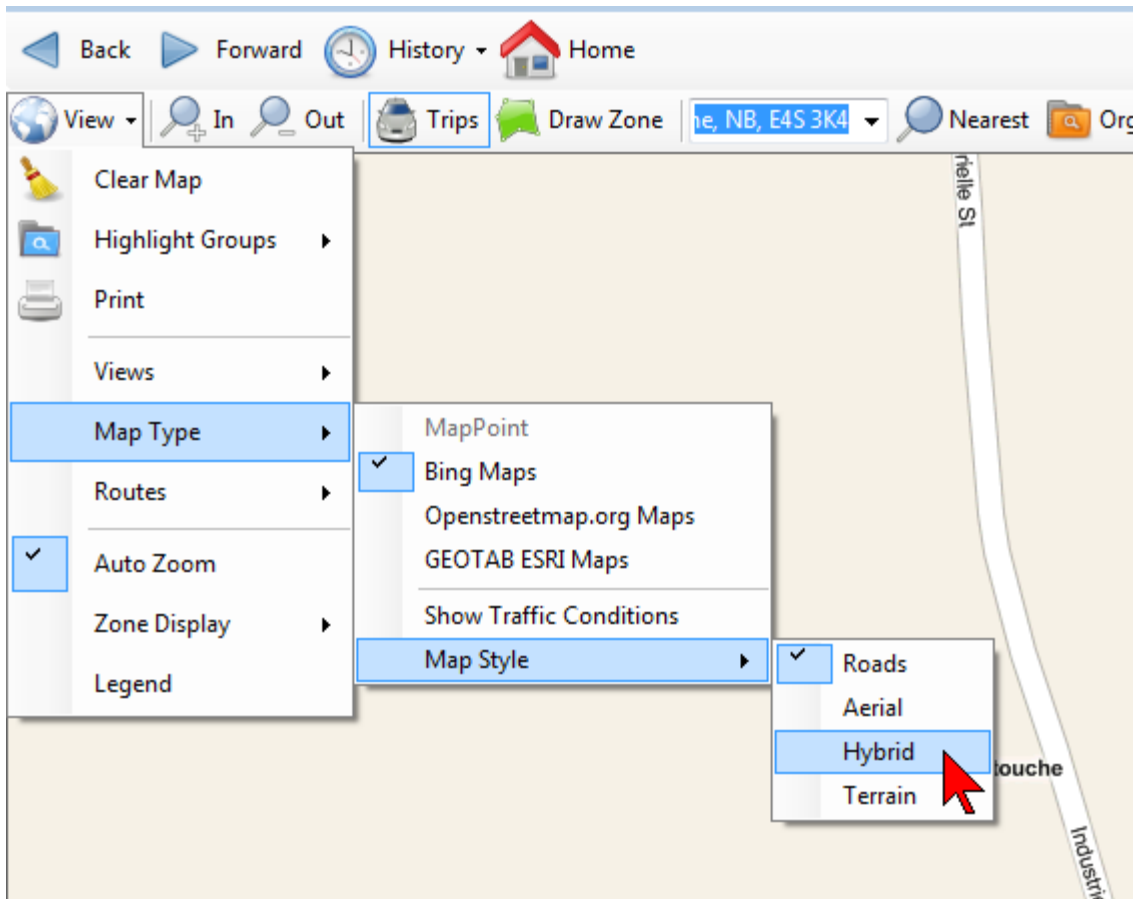- **Map is repositioned to found address**

- **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"**

-

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. Ie. 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.**

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

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

Transparency
More...

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

➕ Add   ➖ Remove   🧹 Reset

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)
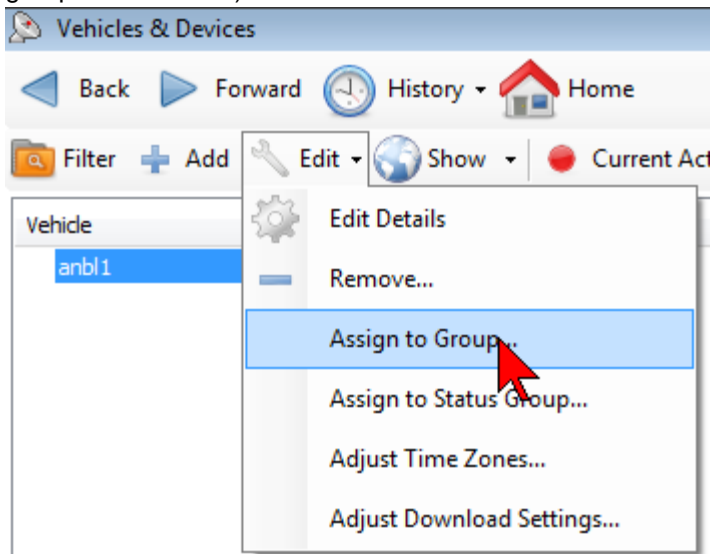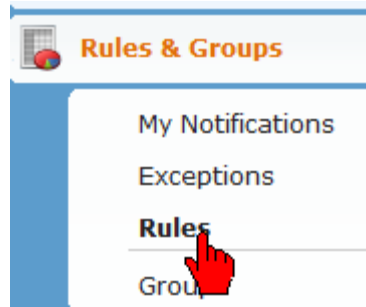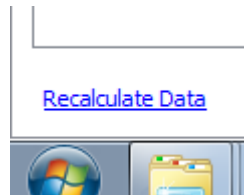

12.

Applying New Zones to Historical Trips:

Recalcuate 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 th

➕ Add ➖ Remove

Add
Device

Select I
Please se

➕ Add ➖ Remo

Device

🖫 SM1
🖫 SM2