RULES MODULE GUIDEBOOK

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1. Introduction _____

The Rules Module allows you to establish an action to be taken automatically by the system when a precise behavior is detected, in connection with a driver or a vehicle, according to pre-established criteria.

As an example, you can create a rule allowing you to manage a driver's speeding during his work day. In this case, you will receive an email notification advising you that this driver has exceeded the pre-established speed limit.

IMPORTANT NOTE :

In order to protect the privacy of users, note that once the criteria has been met, a rule or an event targeting a person of which she is not herself the author, will be applicable only when the trips are in business mode or when that person allows other users to view their personal trips.

To allow other contacts to see your personal trips, you can activate this option in the **Configuration module, Contacts section, in the Settings tab by selecting the box Allow Other Contact to See My Personal Trips.**

If the rule or the event targets the person that is the author, then the privacy criteria will not be applicable and the requested action will be carried out as soon as the criteria has been met.
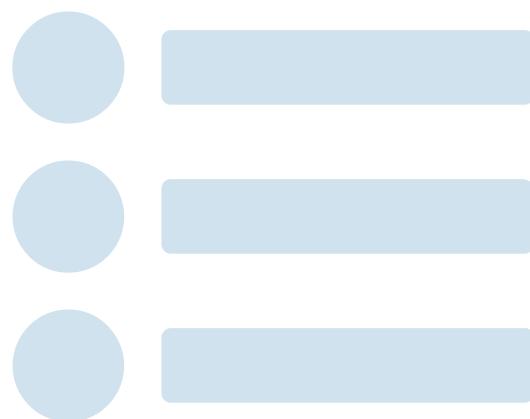
2.Activation & Rights_____

Activation

The Rules module is presently not available for all of ODOTRACK's customers. You must have the Platinum package. To activate the module, you must place a request to our technical department. To do so, we invite you to communicate directly with your ODOTRACK representative.

Once activated, a new icon will appear in the menu on the left ☰

Permissions

In the Configuration module, Roles section, you can define the role of the different users. By default, when the Rules module is activated, users will have access to the complete module.
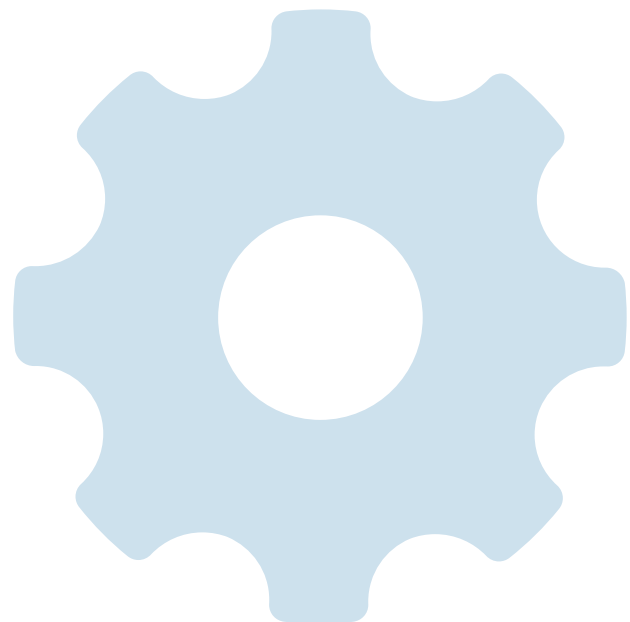
⚙

You can then define the actions allowed for each user. You can then choose from the following accesses:

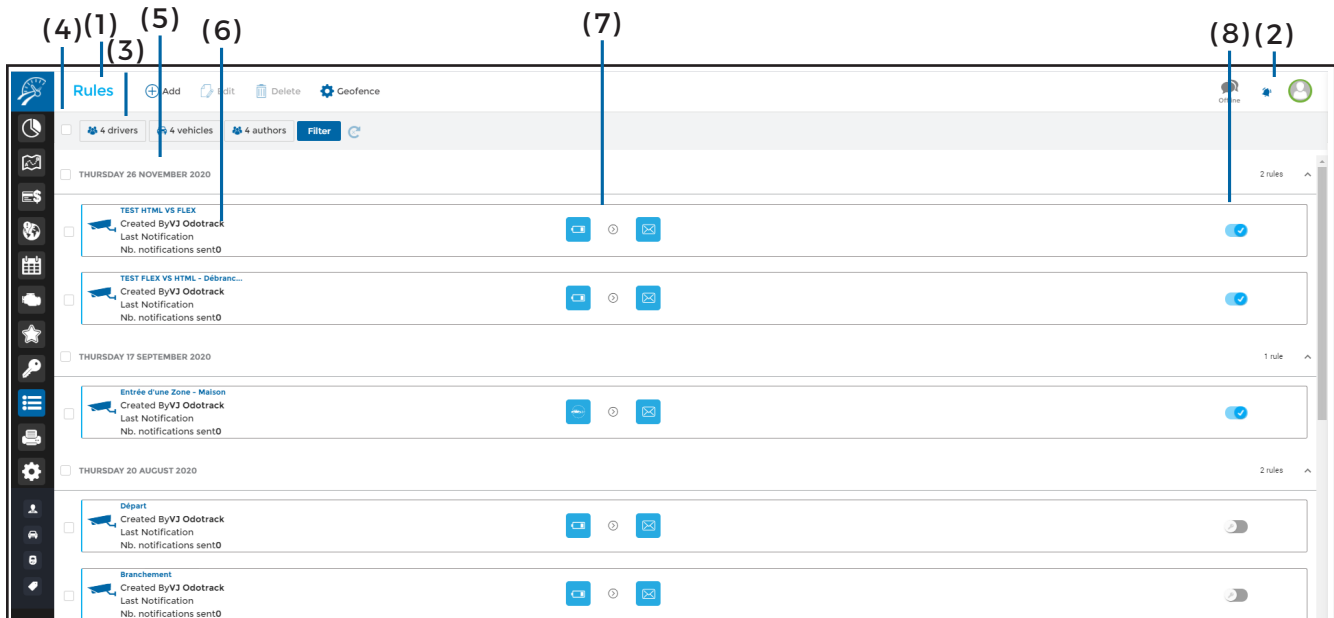| ☑ RÈGLES	7 permissions sélectionnées sur 7 ⌃
☑ Permettre l'ajout d'une zone	☑ Permettre l'ajout de règle
☑ Permettre la suppression d'une zone	☑ Permettre la suppression de règle
☑ Permettre la modification d'une zone	☑ Permettre la modification de règle

3. Overview

Below is an overview of the different elements in the Rules Module.

(1) Main Menu – left section : Allows you to do desired actions quickly i.e.: Add, Edit, Delete or Geofence;

(2) Main Menu – right section: Allows you to view notifications, send comments to technical support and allows you to disconnect from your account;

(3) Selection Menu : Allows the choice and order of the rules you wish to view:

(3.1) Show rules created based on drivers, vehicles or author of the rule. By default, the system will show all rules in decreasing order by date;

(3.2) Filter rules by status, active or inactive;

(3.3) Refresh view of newly created rules by clicking on refresh button;

(4) Selection Boxes : Allows you to choose the rule(s) desired. To select All, click on the box to the left of the Selection Menu. To select All rules created on the Same Day, click on the box to the left of the date desired;

(5) Date : By default, the date of creation is shown;

(6) Type, author & notifications : Indicates the name and type of rule created, the author, the last date of execution and the number of notifications sent;

(7) Condition & action : Indicates the condition of an action that will take place once the rule will be applied. Currently, the only action possible is "Send email";

(8) Status : Indicates the status, active or inactive;

4. Types of rules _____

The following table explains in details the different types of rules and events and their related operators.

Take note that you can combine different types of criteria for each created rule or event. Also, conditions will vary according to the type of criteria selected.

Icon	Criteria	Condition	Description	Value	Description
	Position status	Not in this zone	If the position of the device is out of the defined zone	Zone	Which zone is applicable to the criteria
		In this zone	If the position of the device is in the defined zone		
	Position event	Exiting from this zone	If the position of the device crosses outside the defined zone		
		Entering in this zone	If the position of the device crosses inside the defined zone		
	Device event	Equal	If the event related to the device corresponds to a defined event		When the ignition is turned on
					When the battery is low
					When the device is connected to a power source
					When the device is disconnected

Icône	Type	Condition	Description	Valeur	Description
					When the ignition is turned off
					When the "End trip" button is selected
					When the "Function 1" button is selected
					When the "Function 2" button is selected
	Speed	Lower than	If the speed is lower than the defined speed	Speed	
		Greater than	If the speed is greater than the defined speed	Lasting a minimum of	How long (min) the speed must be maintained
	Hour	Greater than	If the time of travel is greater than the defined time	Time	Time in hours and minutes
		Lower than	If the time of travel is lower than the defined time		
		Equal	If the time of travel corresponds to the defined time		
	Day of week	Equal	If the date of travel is greater than the defined datei	Day	Selection of the day of the week
		Greater than	If the date of travel is greater than the defined date		
	Date	Lower than	If the date of travel is lower than the defined date	Date	Selection of the date
		Equal	If the date of travel corresponds to the defined date		

5. Add a rule

To add a rule, click on Add in the main menu

Firstly, you must choose a category. Currently, the only category available is **Tracking**. This category allows you to manage in real-time all travel data and position of your device.

For example, a rule can be created to receive email notifications once a driver, during his work day, surpasses the speed limit previously set.

Select the option desired and click **Next:**

- Add New Rule;
- Select an Existing Rule.
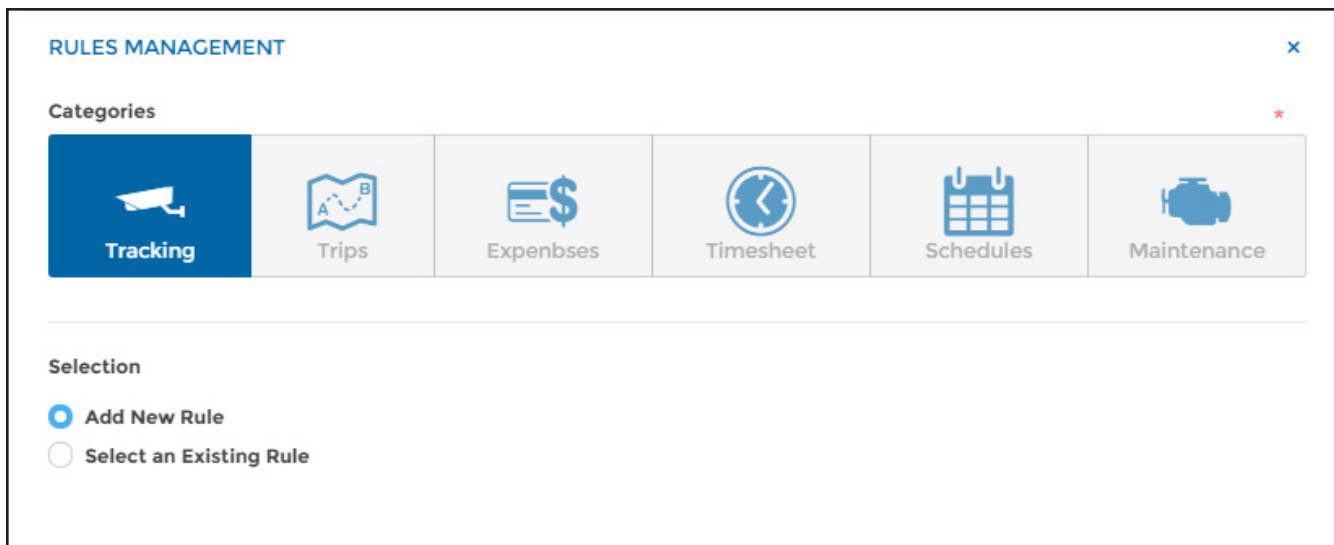
5.1. Add a new rule

When creating a new rule, you must determine the rule's name, status (active or inactive) and the applicable criteria:

You can add multiple conditions for the same rule simply by clicking **Add New Condition**.

For example, you can create the following rule: Speed superior to 100 km/hr for 3 minutes (condition 1), weekdays, from Monday to Friday (condition 2), during workday, superior to 8 am (condition 3) and inferior to 5 pm (condition 4).

(1)   (2)

Only once all established criteria have been met shall the rule be applied.

Afterwards, select the desired actions that you wish the system to take and what message you wish it to send.

(1) Action : Choose the action required. Currently, the only action available is: Send email;

(2) To : Choose recipients of the notifications sent by email by separating each email address by a semi-colon (;);

(3) Subject: Indicate the subject you wish to appear in the email notification;

(4) Interval : Indicate the time-frame, in minutes, that you wish to receive email notifications;

(5) Message : Indicate the message you wish to appear in the email notification. If desired, you can use the available key words;

(6) Key Words : Indicates the key-words you wish to have appear in the email notification. You can choose between: "Vehicle", "Driver", or "Device". The system will insert, the name of the vehicle, driver or device targeted by the rule established in the account, in the email notification sent.

You can add more then one action to a rule by clicking **Add New Action.**

Once the field is populated, click **Next** to complete the rule.

Then choose the driver as well as the vehicle to which the rule is applicable, by clicking **Apply** at the bottom of the list of drivers or vehicles (right panel).

(5)

RULES MANAGEMENT   ✕

You must select at least one driver or vehicle.
Driver(s)   **Vehicle(s)**

👥 Select drivers   🚗 Select vehicles

                                    Previous   **Finish**

DRIVER	✕
☐ ⬇️ 🏷️ 👤 👥 🔍	
☑️ NO GROUP	1 contact ⌃
☑️ VO VJ Odotrack	
☐ AUTEUIL	2 contacts ⌃
☐ JD Jean Dit	
☐ OT Odo Track	
☐ VIMONT	1 contact ⌃
☐ AL ALF L'Extraterreste	
☐ ARCHIVED	1 contact ⌄

VEHICLES	✕
☐ ⬇️ 🏷️ 🚗 👥 🔍	
☐ NO GROUP	4 Vehicles ⌃
☐ OD ODO50 - Hyundai Elantra 2012	
☑️ OD ODO70 - Honda Civic 2012	
☐ OD ODOmobile - Valérie Android car	
☐ TO Toyota Corolla 2019	
☐ SOLD	3 Vehicles ⌄

Once the choice of driver(s) or vehicle(s) is completed, click **End.**

Practical advice

Below are some practical tips when establishing a rule that has numerous conditions to respect

- A rule must not overlap several days when there is a stipulation within it relative to time.

  For example, if you wish to be notified when a driver uses a vehicle outside the timeframe of regular service hours (ie: after 5pm & before 8am), there must be two separate rules created: the first for vehicle use after 5pm (day1) and the second for usage before 8am (day 2).

N.B.: If there is no time constraint in the rule created it can be applied over a period of numerous days. For example, a rule can be created to show usage on weekends (Saturday & Sunday). One rule can simply be created encompassing both days of the weekend.

When the criterion ''inferior to'' or ''superior to'' are applied in the same rule, the ''superior to '' criteria must be applied first.

For example, if you wish to be notified when a driver uses a vehicle outside the timeframe of regular service hours (ie: after 5pm & before 8am) , there must be two separate rules created preferably in this manner:

- Rule 1: Type of rule = Time + condition 1 = superior to 17hr + condition 2 = inferior to 24hr (between 5pm & midnight)

- Rule 2: Type of rule = Time + condition 1 =superior to 8hr + condition 2 = inferior to 0hr

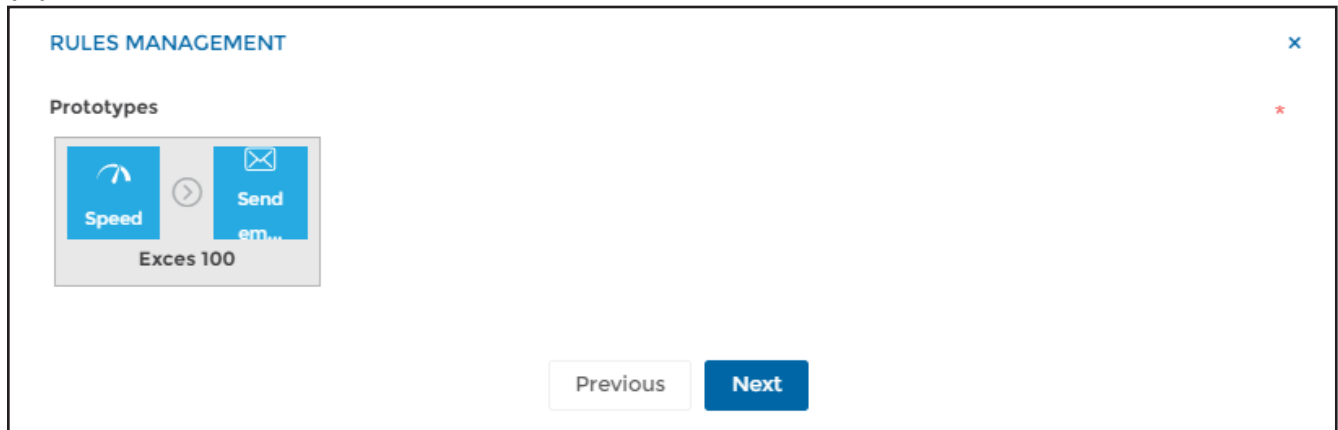N.B: additional criteria can be added if so desired.

5.2. Select an existing rule_

You can select a pre-existing rule (prototype). Click **Add** in the main menu, choose the category (Tracking), click S**elect an Existing Rule** then click **Next.**

You will see all rules created. Currently, the only rule available is: Excess 100 (speed superior to 100 km/h).

(6)

The icons show the type of rule, criteria to be respected (position status, position event, device event, speed, hour, day of week or date). The next icon shows the type of action taken by the system (send email notification). Below this, you will see the name given to this rule.

To view or modify the details of the pre-existing rule, click directly on the rule followed by clicking **Next** to make any desired changes.

6. Modify a rule _____

To modify an existing rule, select the rule you wish to modify from the listing and click **Edit** in the Main menu.

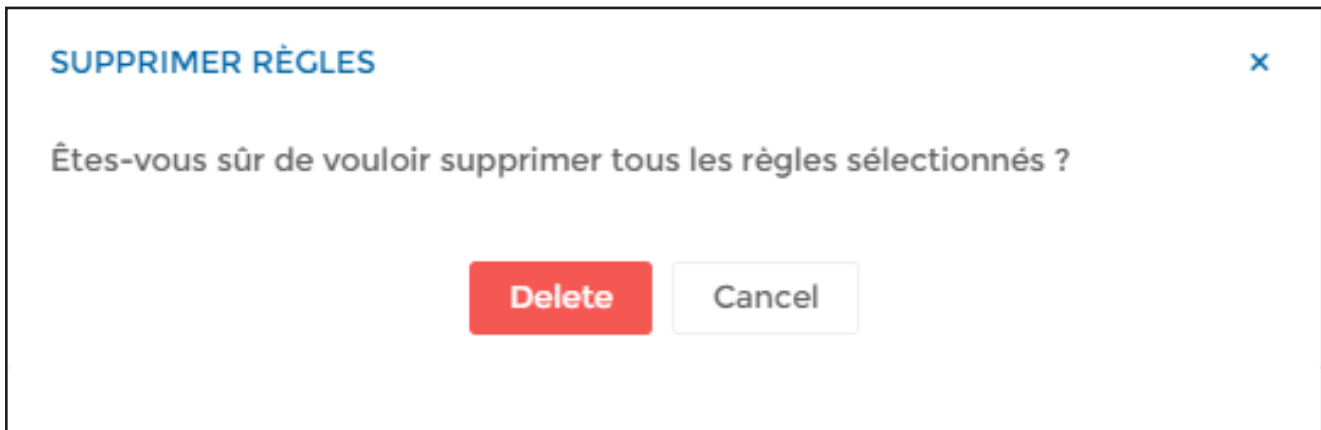Follow the required steps and click **Finish** to confirm your changes.

7. Delete a rule _____

You can delete more then one rule at a time.

From the listing, select the rule(s) you wish to delete and click Delete in the Main menu.

A pop-up window will open so that you can confirm your choice by clicking Delete.
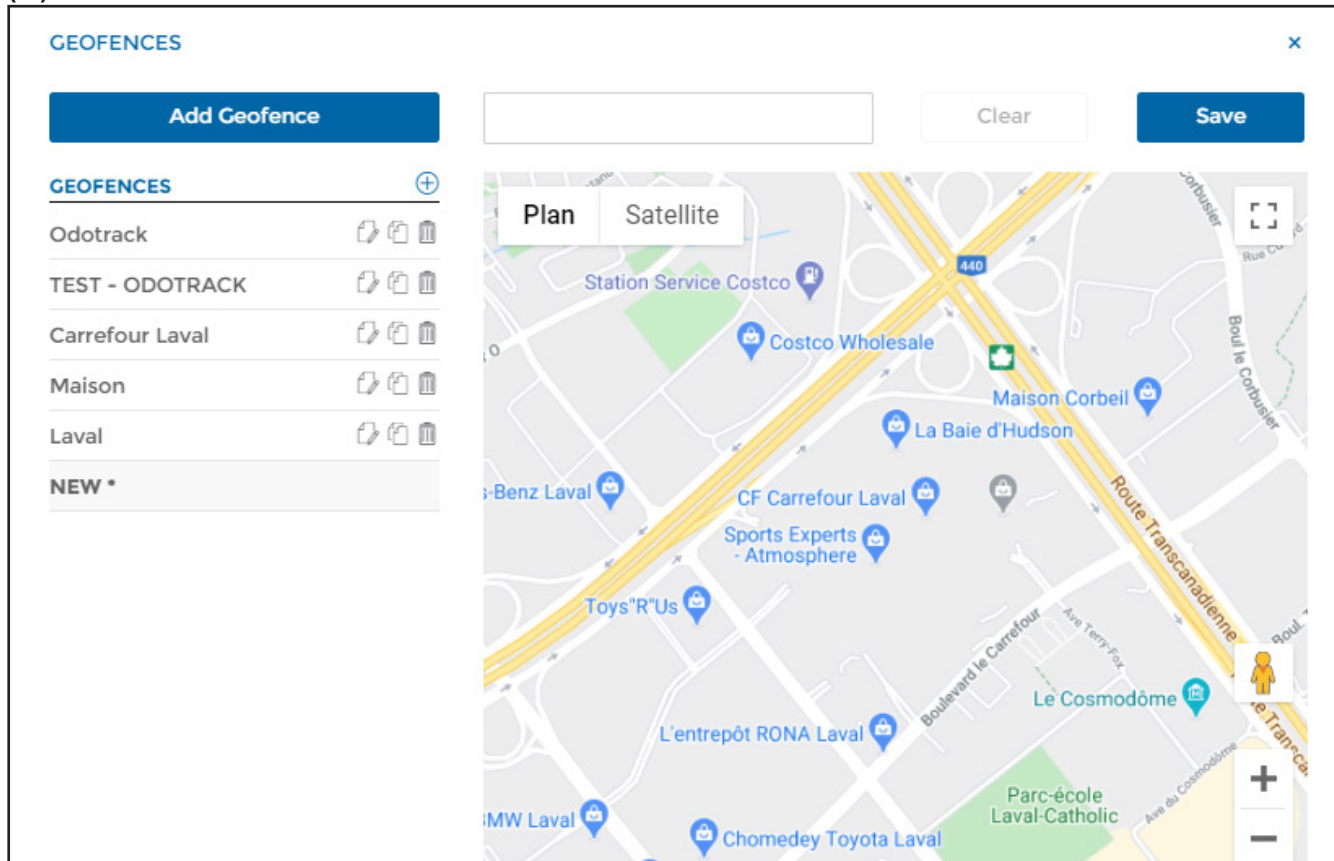
(7)

NOTE :

It is recommended to make a rule inactive versus deleting it. This way, the rule will be saved in the Rules module but will not be applied. You can reactivate it at a later date.

8. Geofencing

To create a geofence zone, click **Geofence** in the Main Menu followed by **Add Geofence**.

Choose the name of the geofence and click **Save**.

(8)

Delimit the area directly on the map by double-clicking with the left button of your mouse. This will create the starting point of the area to be delimited.
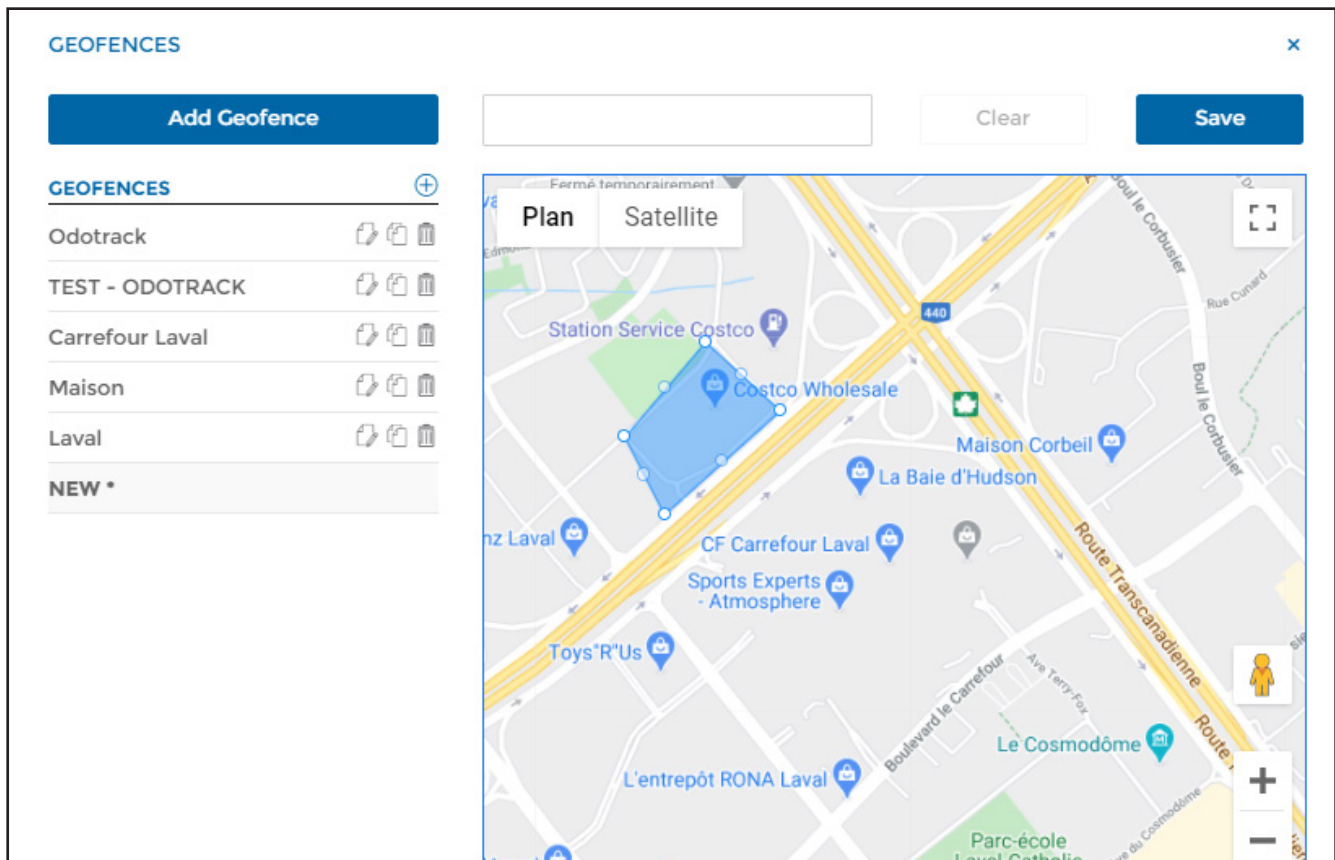
By moving the cursor of your mouse, a small string will appear to allow you to delimit the other points of the zone. Each mouse click will create a new boundary (segment). You can thus create as many points as you wish to delimit the entire zone.

(9)
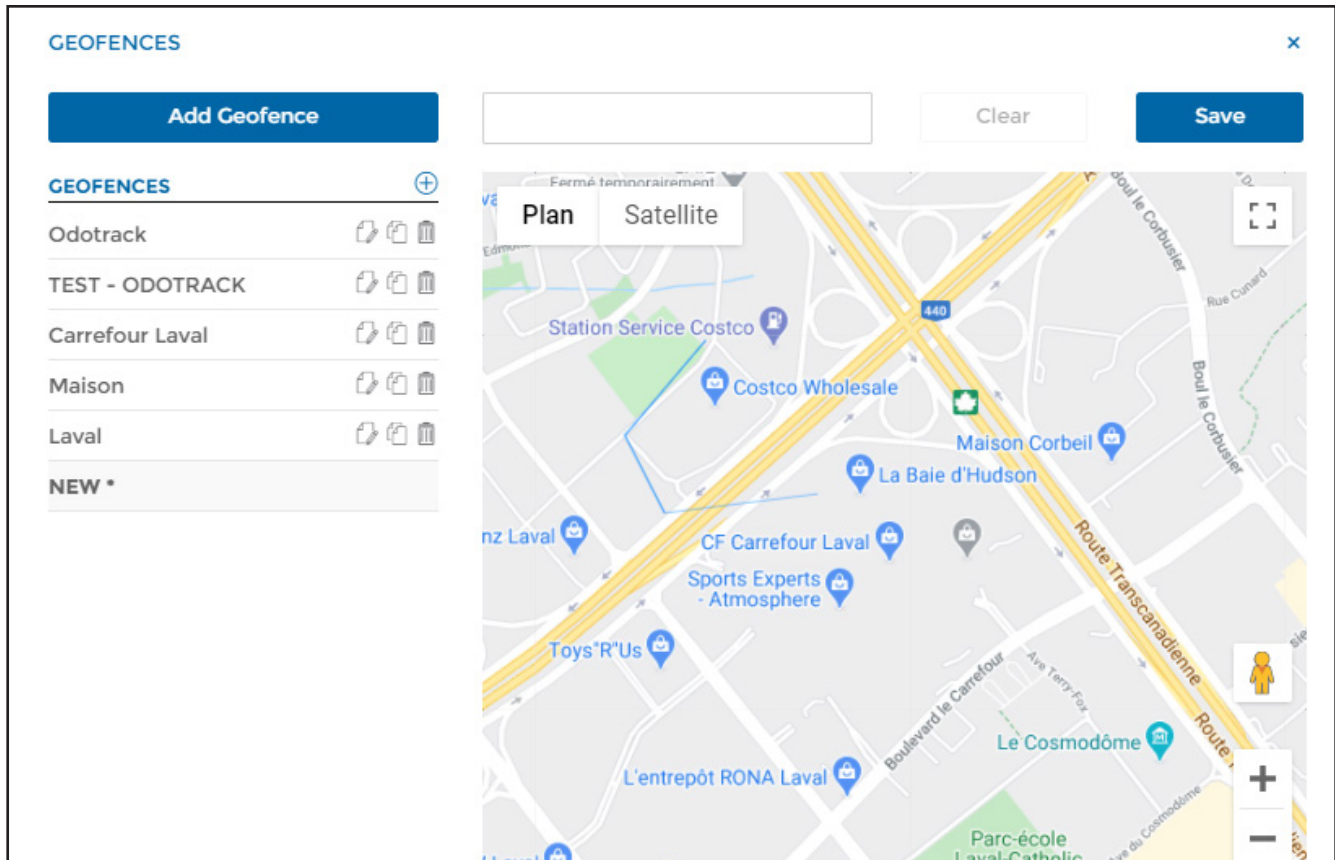
Once the zone is delimited, it will appear on the map in blue. Click **Save** at the top right of the window.
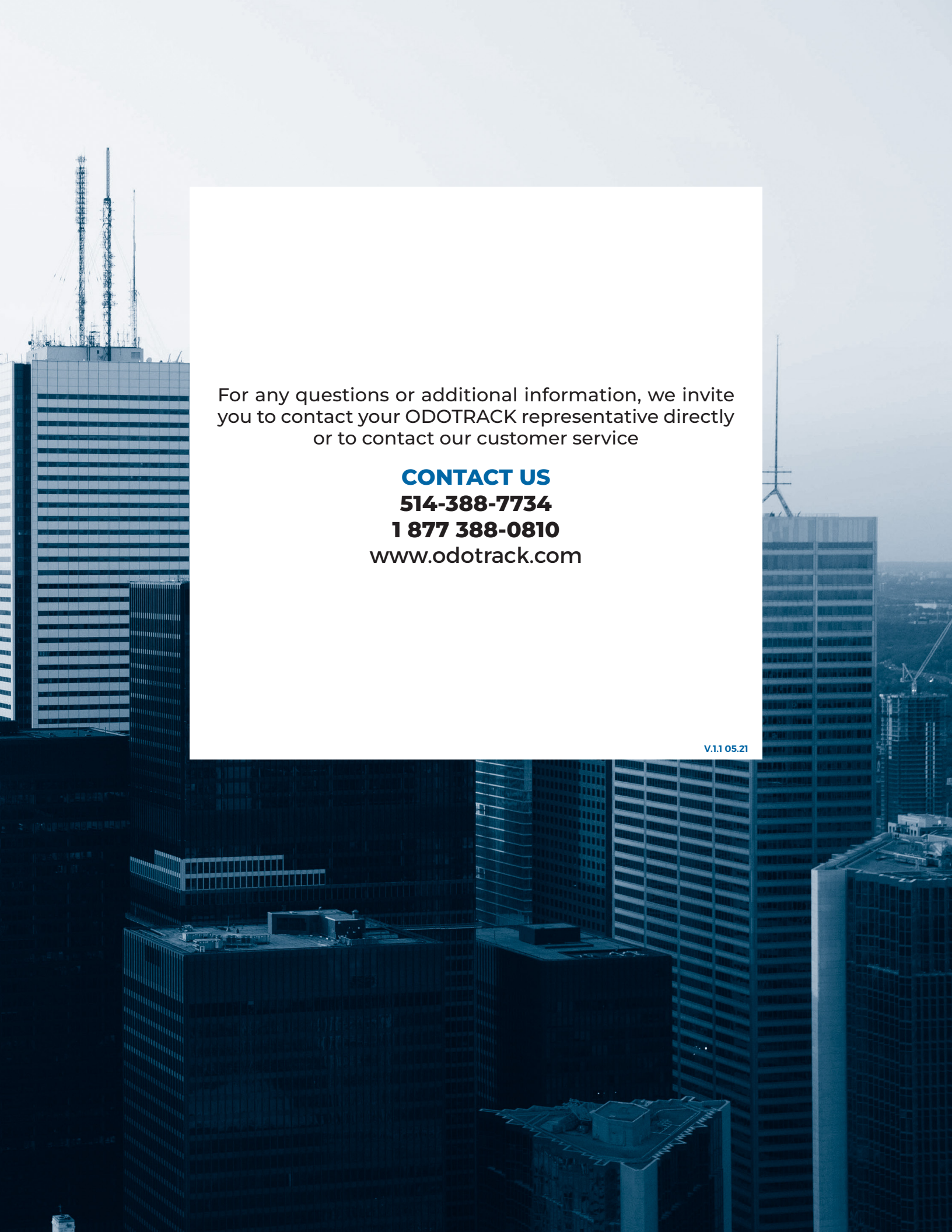
(10)

Please note, that once an area is delimited, you can subsequently move one or more points appearing on the map (to reduce it, enlarge it or modify it) or even move the entire area. Simply select the area in the geofencing list and click on the point or area to move while holding down the left button of your mouse. Once the point or area has been moved to the desired location, release your mouse button.

Once all modifications completed, click **Save** at the top of the window

NOTE : You can view the entry and exits of the geofenced zone in the Configuration module, Devices section, in the Events tab without having to create a rule to receive a notification.

For any questions or additional information, we invite you to contact your ODOTRACK representative directly or to contact our customer service

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