DESCARTES™

USER'S GUIDE

Descartes SmartFleet™

September 2017

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CONFIDENTIAL AND PROPRIETARY TO THE DESCARTES SYSTEMS GROUP INC. AND ITS AFFILIATES

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Introduction

Descartes Telematics is an Federal Motor Carrier Safety Administration (FMCSA) ELD Compliant solution for Hours of Service (HOS) and automatic recording of ELD Diagnostics and Malfunctions.

Document Conventions

This document uses the following conventions:

- Names of windows, frames, dialogs, menus, list boxes, and lists begin with uppercase and are bolded. (Tools menu, Save button)
- Key combinations that you press appear in mixed case. If the keys are joined by a plus sign (+), press and hold the first key simultaneously with the remaining keys (for example, CTRL+ALT+DEL).
- Text that you type appears in `Courier New` font. (Enter `USERID` in the login field.)
- Cross-references to other documents, or to sections within the current document, appear in underlined italics. (See *Saving a File* for details.)
    - *Italics* are used for emphasis throughout this document.

Note— Information important to a particular task or function is introduced with the note format and icon.

Tip— Information that may make completing a task easier, but isn't essential to the task, is introduced with the tip format and icon.

Warning— This warning format indicates information that you need to pay particular attention to. Ignoring information presented as a warning could lead to damage and unexpected results. Disregarding information presented as a warning may result in damage to your software or data.

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Welcome to Descartes Telematics SmartFleet™

The Descartes Telematics SmartFleet application allows drivers to manage and comply HOS rules and exchange information between the driver's vehicle and the back-office system. This information includes the following:

- Vehicle GPS position
- HOS Logs with location and timestamp
- Vehicle performance information:
  - Speed
  - RPM
  - Idling
- Arrival and departure to/from locations and vehicle stops
- Two-way messages
- Input form entries

Additionally, Descartes SmartFleet provides the folllowing features:

- Communication to/from driver and carrier
- Engine monitoring
- Automated fuel tax reporting
- Navigation
- Input forms – electronic forms; e.g. fuel form, pre- and post-trip, etc.

Audience

The intended audience for this document is drivers using Descartes SmartFleet for their HOS and trainers preparing training material for drivers.

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Starting Your Day

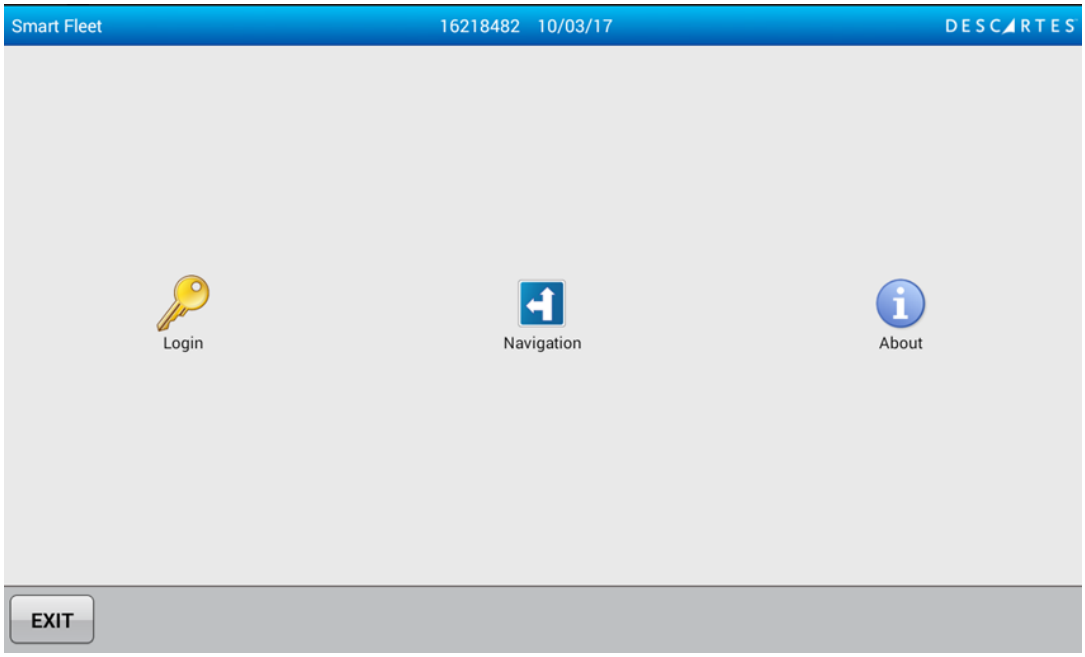
At the start of your day, turn on the ignition, which also boots up your device. The system takes up to one minute to boot, including the time to successfully establish the connection between the box (LMU) and the screen.

The system is ready for use when the User Interface displays.

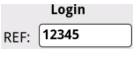
Login

To login:

1 The **SmartFleet Entry** menu displays.



2 Tap the **Login** icon on the **SmartFleet Entry** menu. The **Login** screen displays.

3 Enter your PIN number or reference (REF) number in the login field 

.

4 Tap the **Login** button

.

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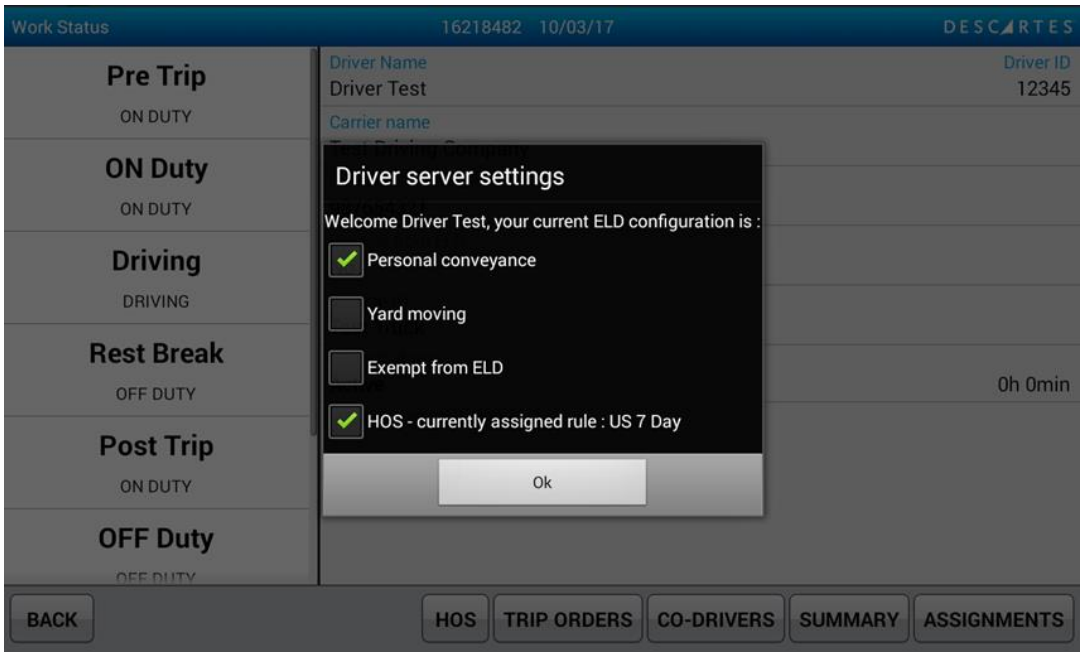

5 Review your settings and tap **OK** to dismiss the dialog. The **Work Status** screen is displayed.

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On the Road

Descartes SmartFleet Main Menu

The icons displayed in the main **SmartFleet** menu are subject to your company's settings. The actual layout on your device may differ from the one provided below.

The **HOS**, **HOS Review**, **Work Status**, **Events** and **Co-Driver** icons are always displayed. The **Trip Orders**, **Input Forms**, **Messages** and **Navigation** icons may also be displayed depending on your company's configuration.

The options available from the main menu are summarized below:

Icon	Description
	View current duty status, switch to new duty status
	Allows an authorized safety official to review and receive (by email or Web Service) HOS reports
	Review and certify HOS logs
	Allows co-driver to login
	Read messages sent from the back-office, send messages to the back-office
	Collect information while progressing your route, signature, pictures, etc.
	View stops on route and confirm Stop completion. (POD)
	Invoke navigation to provide voice guided driving directions and maps.

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Work Status

The **Work Status** screen displays available Work Status options. Drivers can select from different statuses listed on the screen. The following statuses are always available:

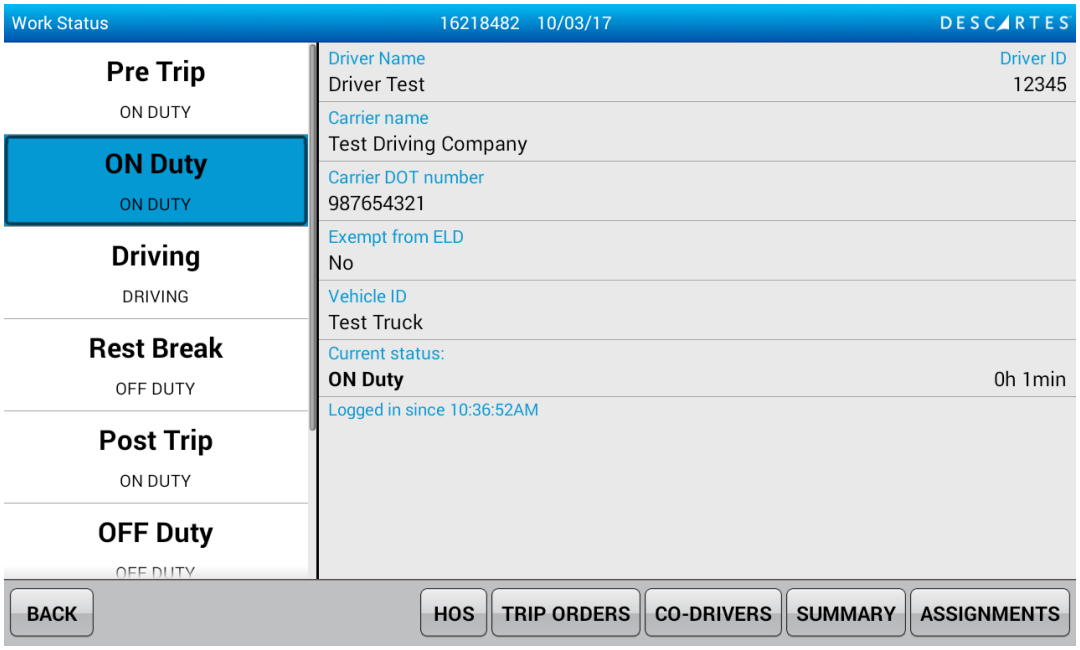
- Off Duty
- Sleeper Berth
- Driving
- On Duty Not Driving

The following statuses may also be available if configured.

- Yard Moving
- Personal Conveyance

➲ **Note—** The "Personal Conveyance" and "Yard Moving" statuses are always displayed, but will appear grayed out if they are not configured to be available.

Once you log in, if you do not select a Duty Status within a configured time period, your Duty Status will be set to the Descartes FleetCenter default status configured for your company. This status is highlighted on the **Work Status** screen.



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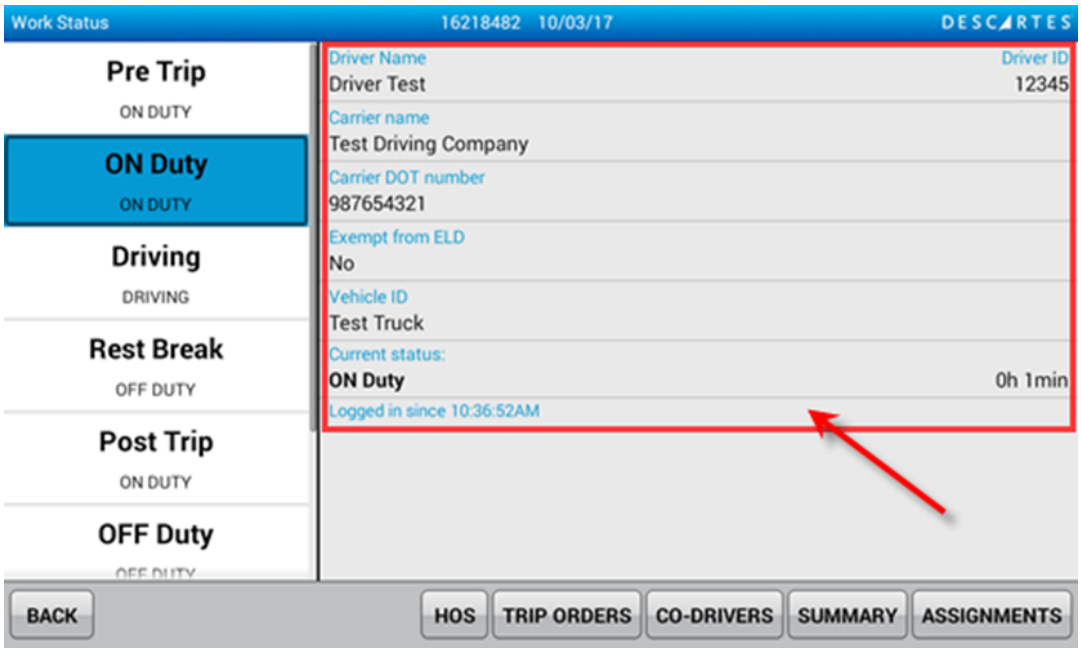
Based on your configuration, there may be multiple "On Duty Not Driving" statuses. In the example above, the driver has an additional "On Duty Not Driving" status configured:

- Pre Trip (ON DUTY)
- Post Trip (ON DUTY)

The **Work Status** screen also displays key details about you and your company:



Drivers can manually change their duty status, but only when the vehicle is stationary.

To manually change duty status:

1 Navigate to the **Work Status** screen.

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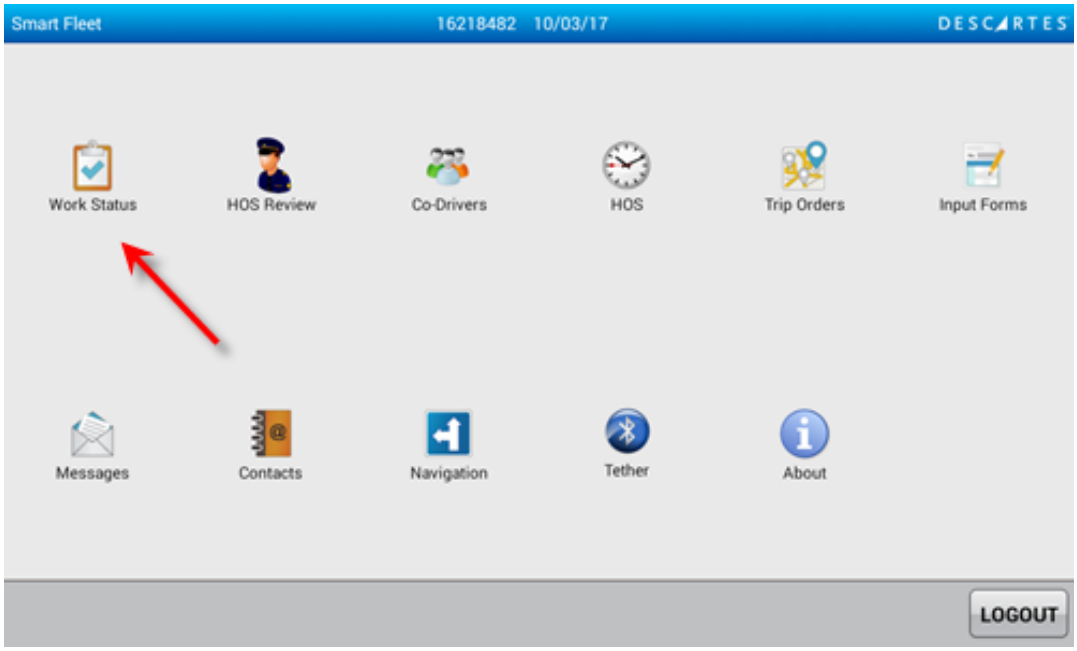
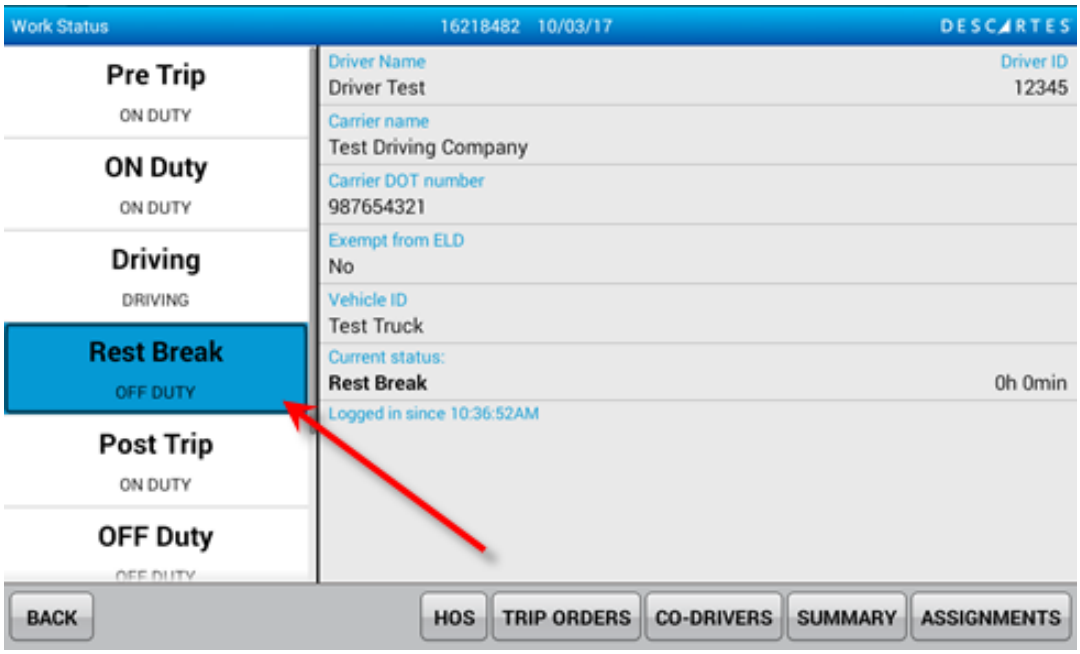


2 Select the appropriate status from the list on the left pane.

➲ **Note—** Drivers cannot manually change status to "Driving".



The status change notification appears briefly and the selected duty status is assigned.

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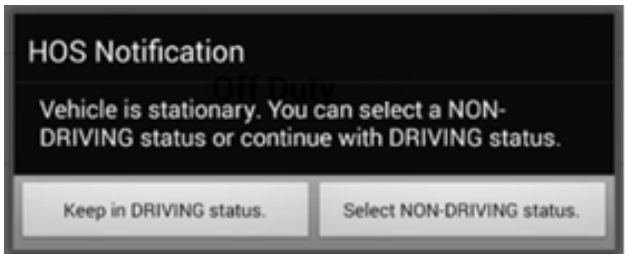
Automatic Status Changes

Status changes to or from "Driving" status are automatic. Descartes SmartFleet automatically sets the duty status to "Driving" when the vehicle exceeds a set speed threshold of greater than five miles per hour.

When the duty status is set to "Driving" and the vehicle has not been in motion for five consecutive minutes, the driver is prompted to respond to a confirmation dialog to continue in "Driving" status or enter the proper duty status.



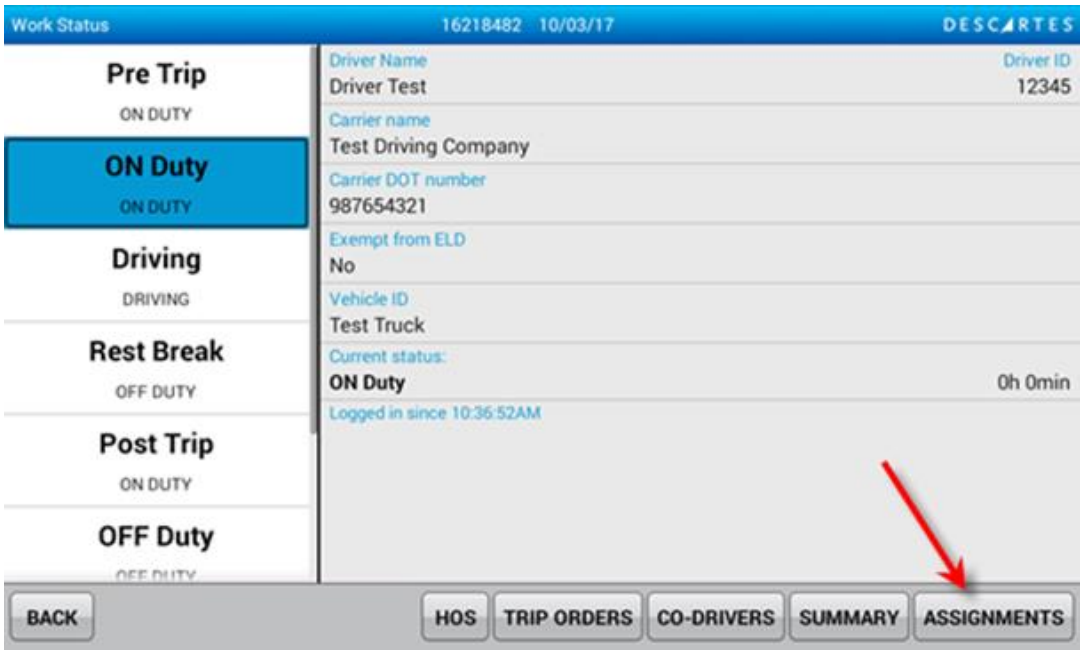
If the driver does not respond to this dialog within 60 seconds, then his duty status is automatically set to "On Duty".

Trailer and Shipping Document Assignment

Drivers can assign trailers and shipping documents from the **Work Status** screen.

To assign a trailer:

1 Tap the **Work Status** icon on main menu. The **Work Status** screen opens. Tap the **Assignments** button.



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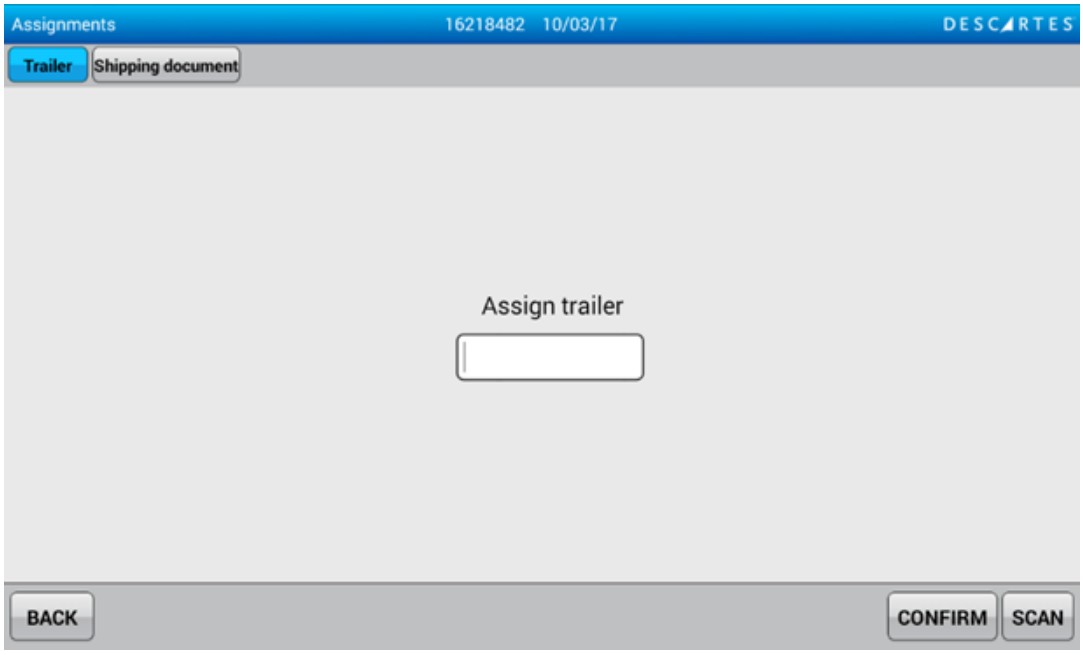
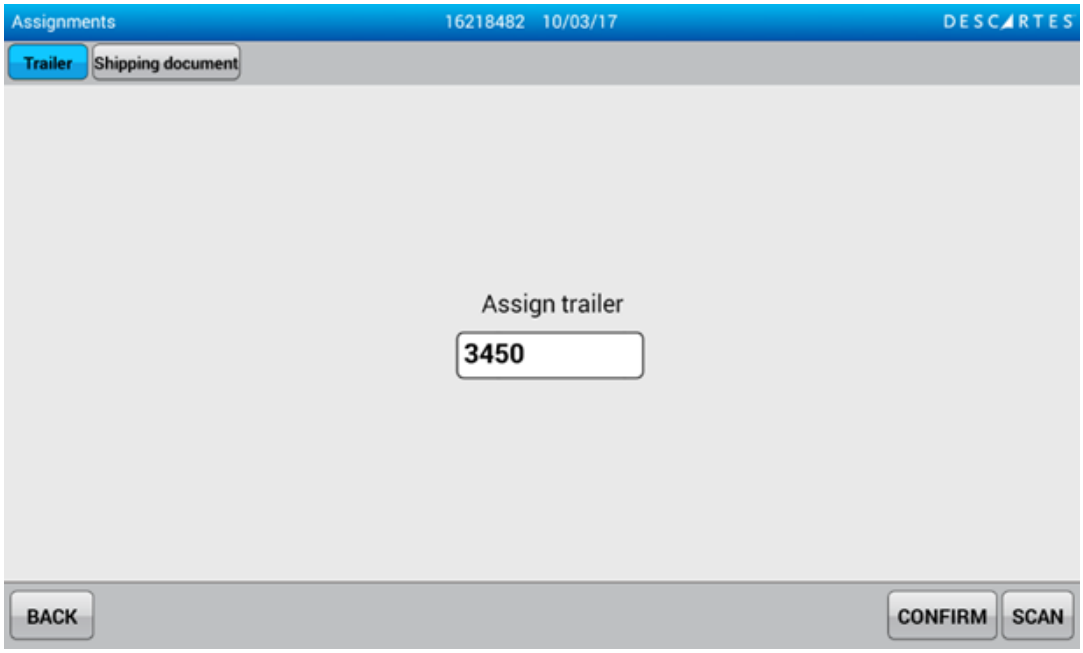
2 The **Assignments/Trailer** screen appears.



3 Enter the applicable trailer ID.



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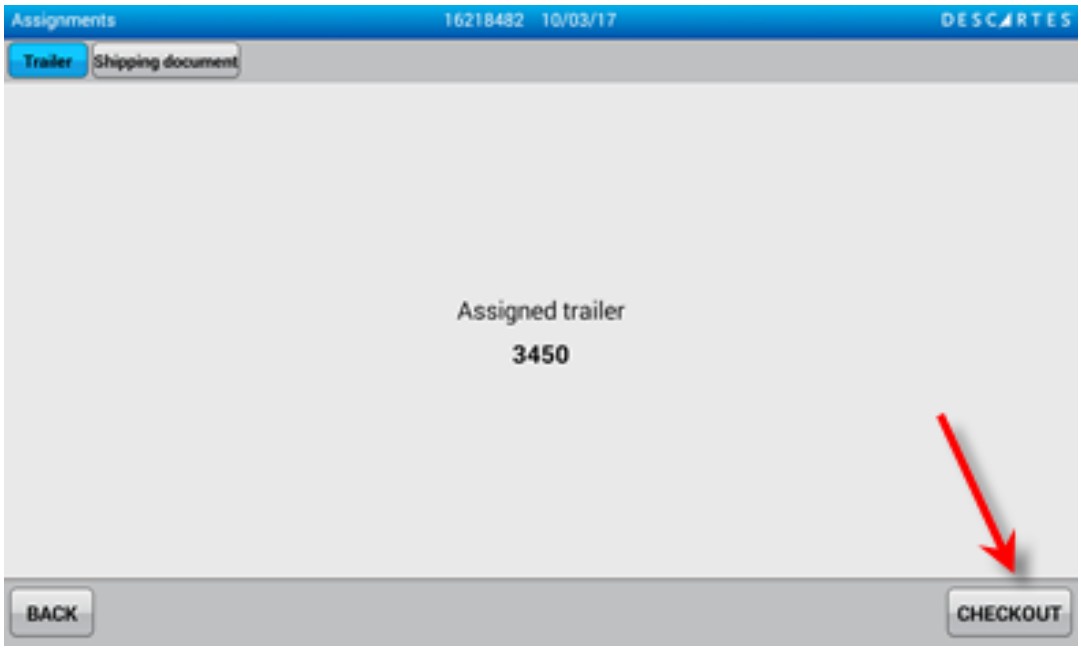
4 Tap **Confirm** button. The trailer is assigned (viewed in HOS Status).

If there is already a trailer ID assigned, but you want to change it manually, follow the same procedure as described above except on the **Assignments/Trailer** screen first tap the **Checkout** button.



To assign a shipping doc:

1 Tap the **Work Status** icon on main menu. The **Work Status** screen opens. Tap the **Assignments** button.

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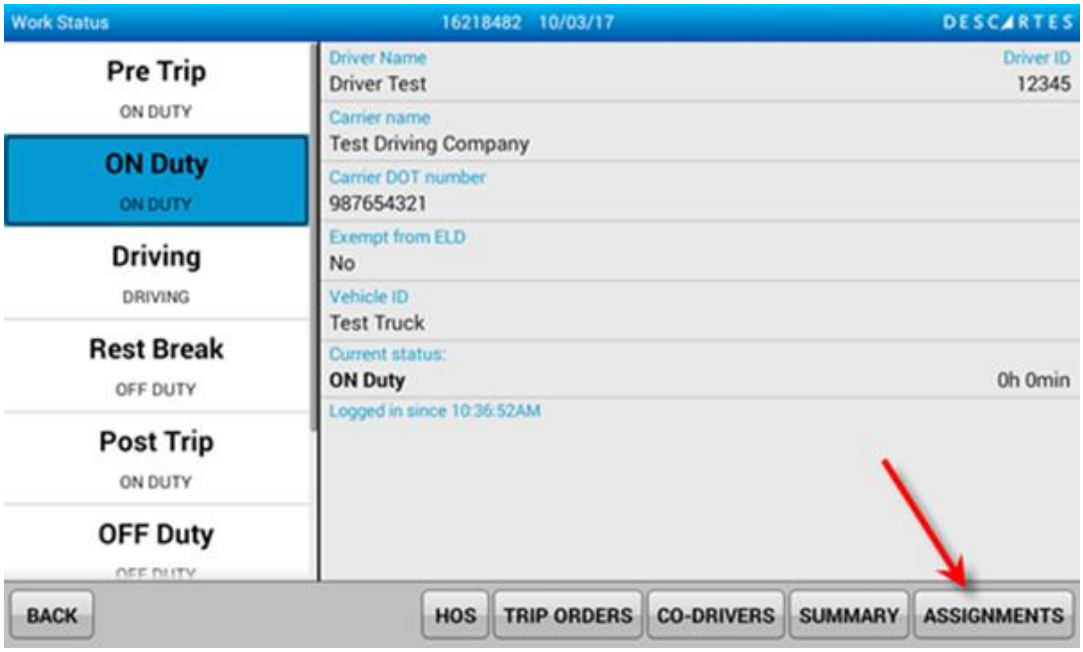
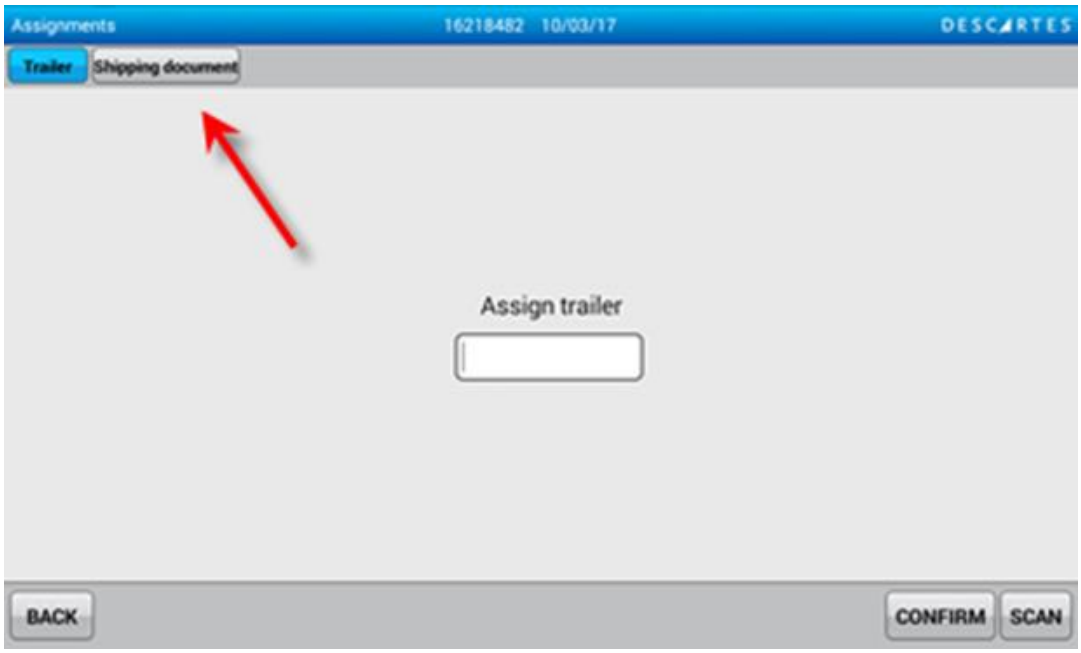


The **Assignments/Trailer** screen appears.

2 Tap the **Shipping document** tab.



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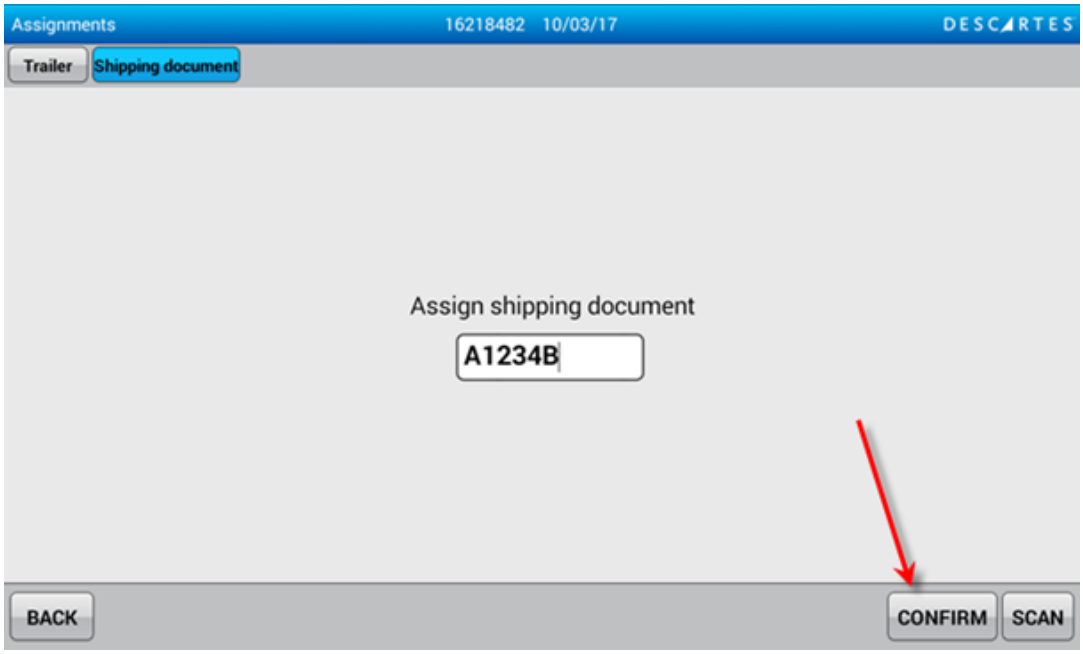
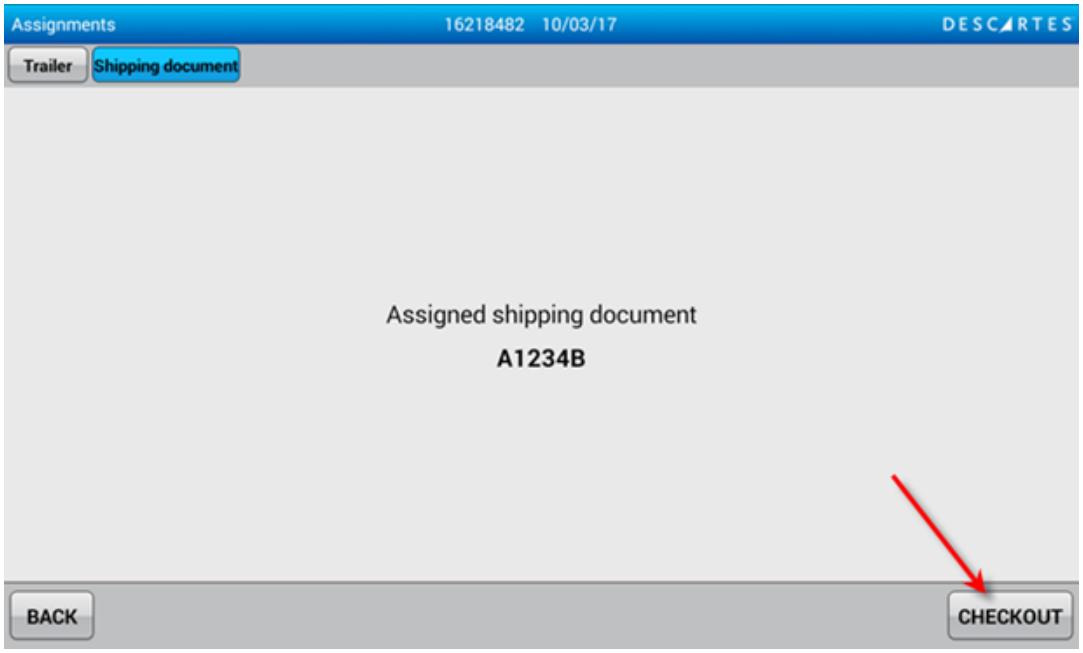
3 Enter the applicable shipping document number.



4 Tap the **Confirm** button. The shipping doc is assigned (viewed in HOS Status).

If there is already shipping doc number assigned, but you want to change it manually, follow the same procedure as described above except on the **Assignments/Shipping** screen first tap the **Checkout** button.



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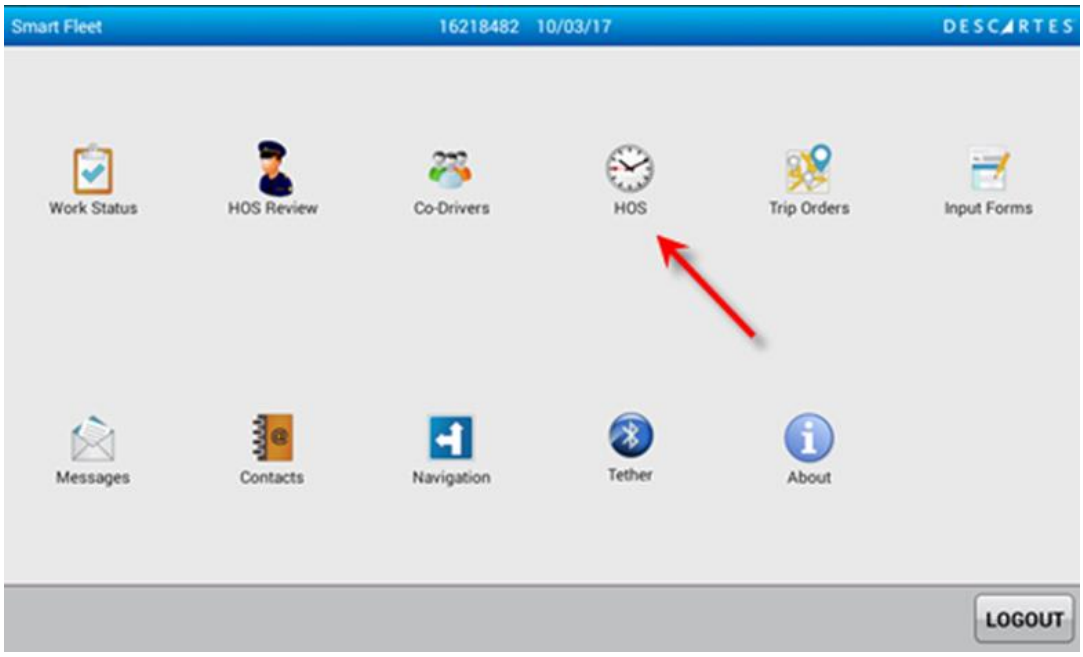
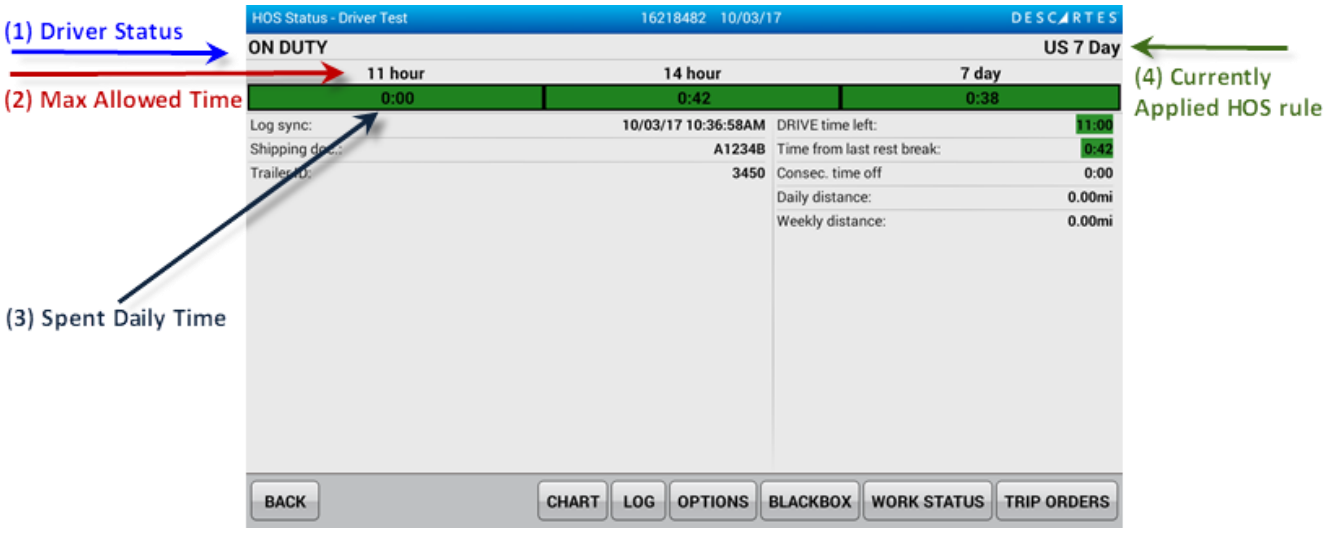
HOS (Hours of Service)

The **HOS** option allows you to view the hours of service (HOS) for the current day and previous 7 days and certify your logs.



Upon selection of the **HOS** option, the **HOS Status** screen is displayed.

HOS Status



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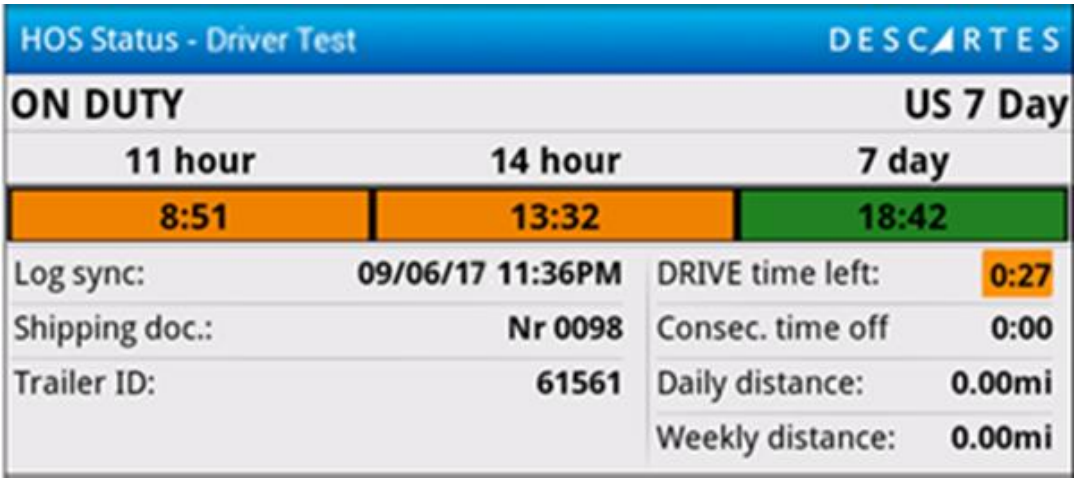
The **HOS Status** screen displays the following information:

1. The currently active HOS status
2. The Max Allowed Time as defined by the applied HOS rule. From left to right, the displayed values are defined as follows:
   - Maximum allowed daily driving time
   - Maximum allowed daily on duty time
   - Maximum allowed weekly on duty time
3. Spent Daily Time. From left to right, the displayed values are defined as follows:
   - Spent daily driving time
   - Spent daily on duty time
   - Spent weekly on duty time

If you have less than one hour daily driving, daily on duty or weekly on duty time left, the time counters will be colored orange.



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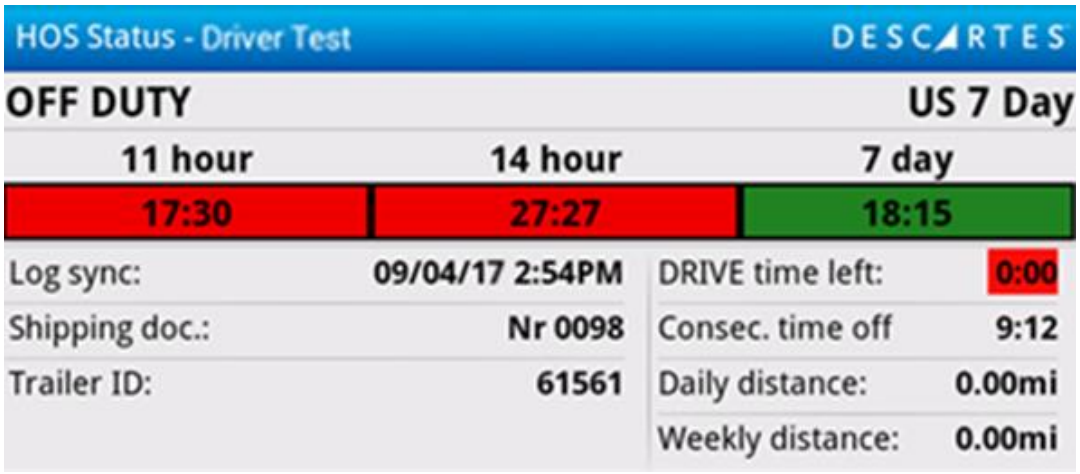
If you are in violation of on duty and/or driving time and/or weekly on duty time, time counters will be colored red.



4 The currently applied HOS rule

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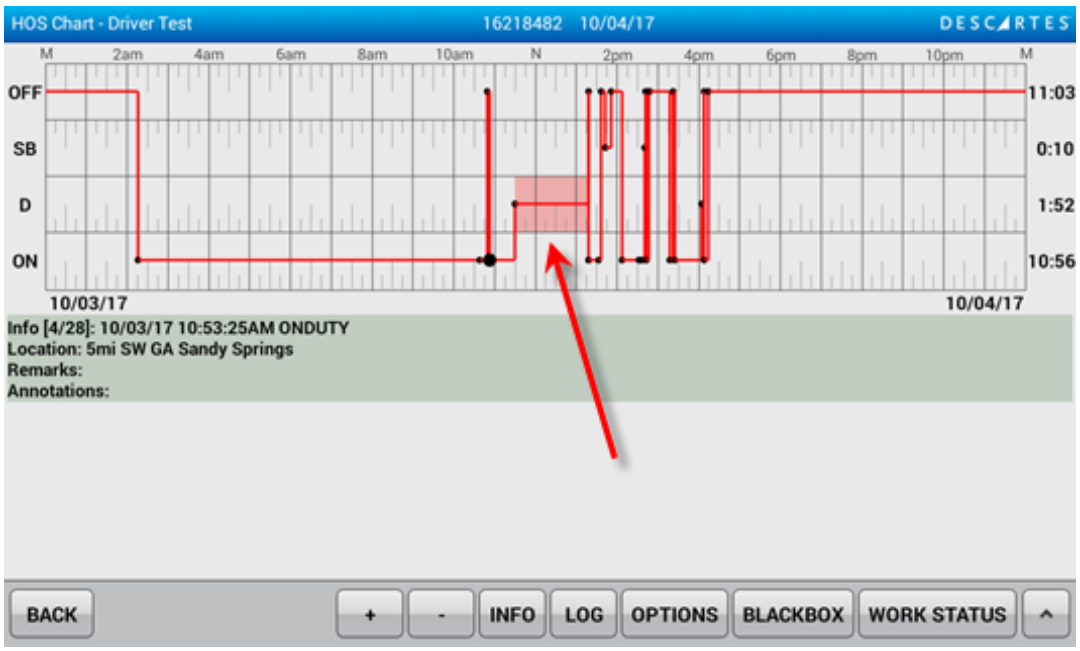
HOS Chart

Tap the **Chart** button to display a graphical representation of HOS status changes with the total number of hours in each Duty Status:

- **OFF –** Off Duty
- **SB –** Sleeper Berth
- **D –** Driving
- **ON –** On Duty Not Driving

Remarks and annotations are represented by black dots on the chart. The portions of the chart that are shaded in red represent violations of "On Duty" or "Driving" status.



In the section below the chart, drivers can view additional information, including remarks/annotations, locations and timestamp. The remark/annotation currently displayed is represented by the black dot on the chart. Scroll through the remarks by tapping the left or right side of the screen.

The portions of the chart that are shaded in blue represent the period of a 34-hour restart.

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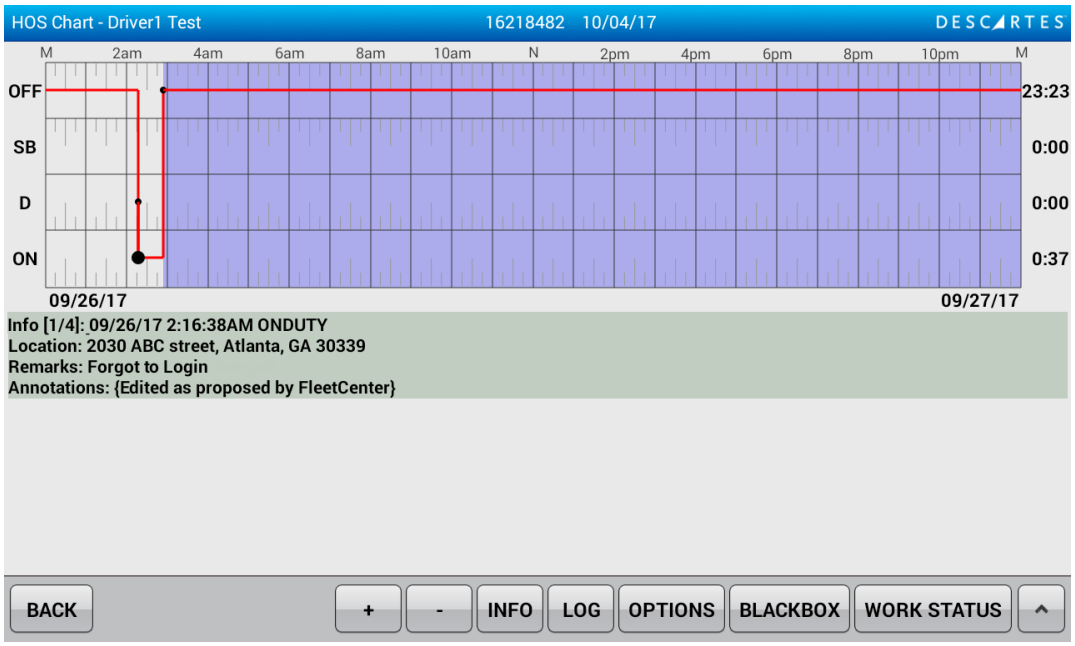
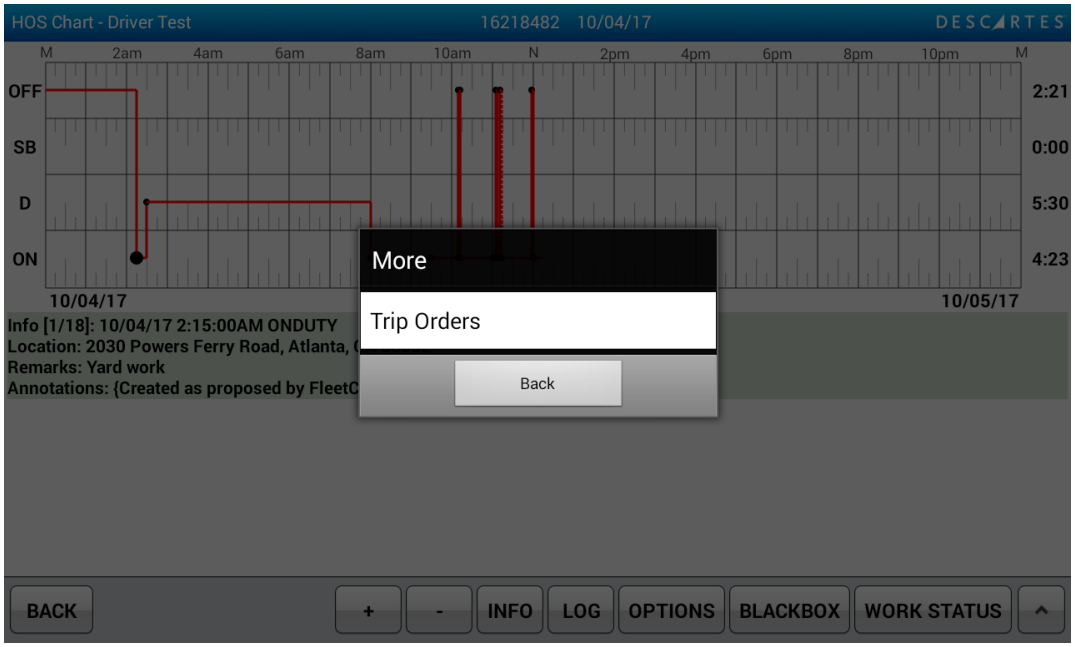


Tap the plus and minus icons to zoom in and out of the chart, respectively. Tap the carat (^) icon to display additional navigation options.



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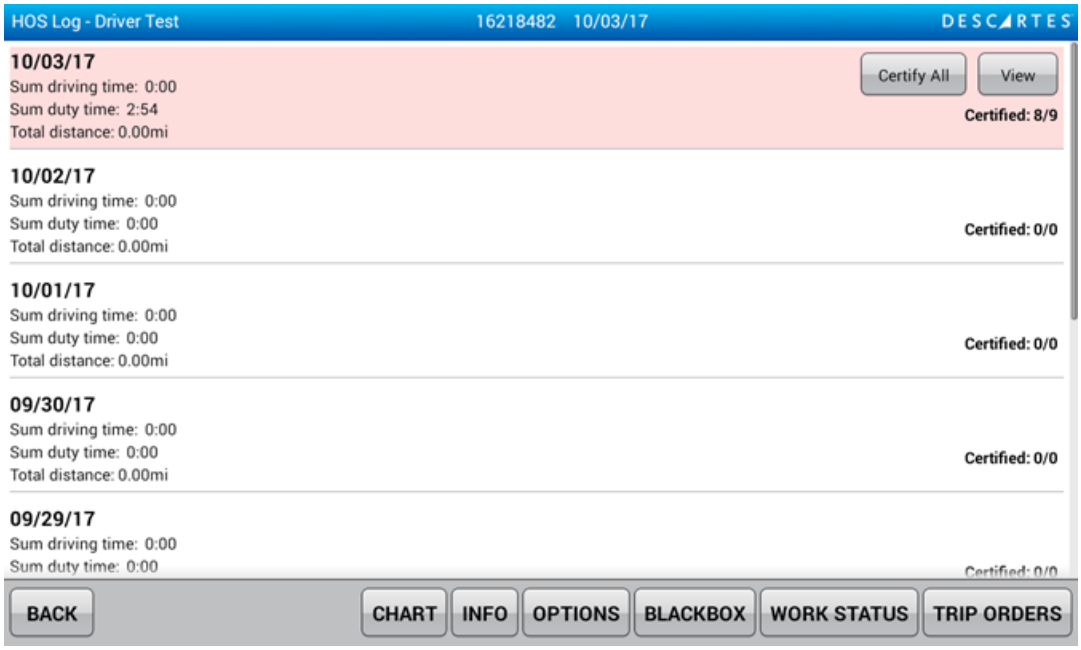
Reviewing and Certifying HOS Logs

Drivers can review HOS logs in Descartes SmartFleet to certify and enter remarks. To review HOS logs, on the **HOS Status** screen, tap the **Log** button. The **HOS Log** screen appears, listing all available days.



An HOS log summary is listed for each day. The number of Certified logs are listed against the total for each record. The records are color-coded to indicate the certification status of each day's logs:

- Green log field if all logs for the day are certified by driver
- Red log field if none or part of the log is certified
- White log field if there are no records for that day

Viewing HOS Logs

On the **HOS Log** screen, tap **View** to display all logs for a given day.

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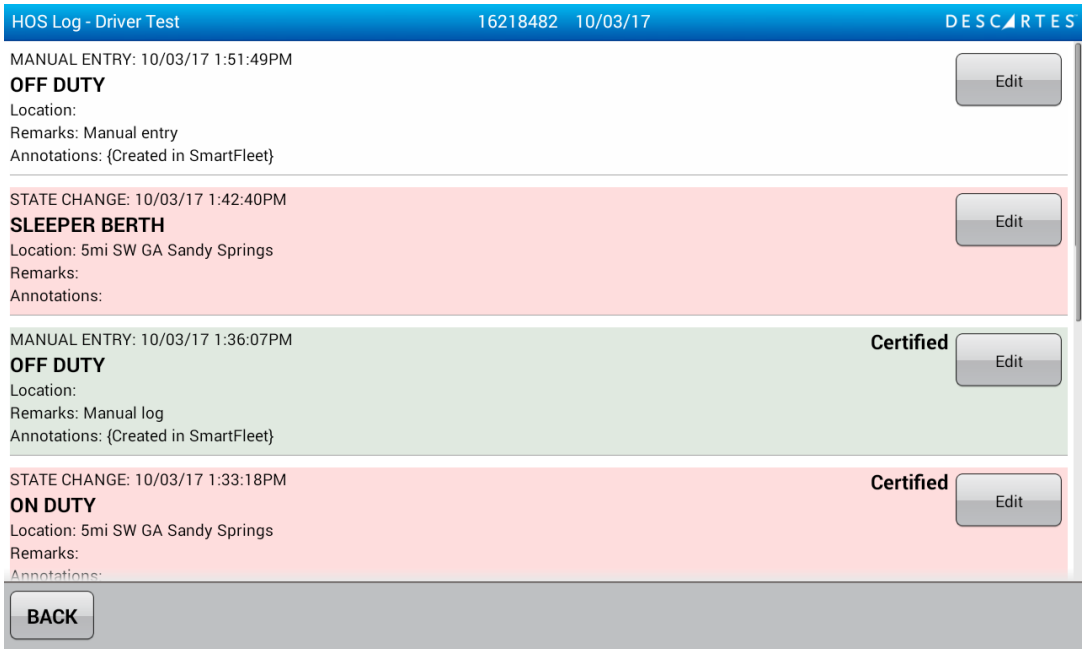

The **HOS Log** screen displays the following details for each log on the selected day:

- Status changes organized by time
- Location and timestamp of every status change
- Remarks and annotations, if available:
  - Remarks entered by driver
  - Annotations entered by the system:
    - When driver reports exception
    - When driver reports personal conveyance
    - When vehicle crosses state border

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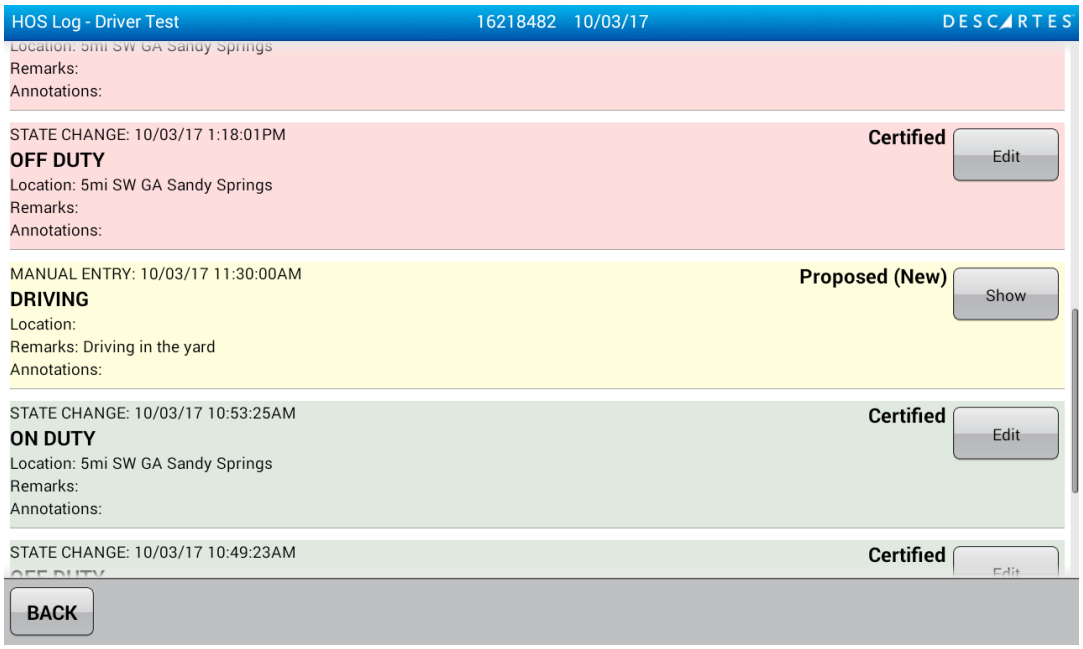

- Uncertified HOS logs are highlighted in white
- Certified HOS logs are highlighted in green
- Proposed (edited) logs are highlighted in yellow
- Original HOS logs are highlighted in gray
- HOS Logs recorded during a diagnostic are highlighted in orange
- HOS Logs recorded during a malfunction are highlighted in red

➲ **Note—** Drivers should certify logs before logging out. See section *Reviewing and Certifying HOS Logs.*

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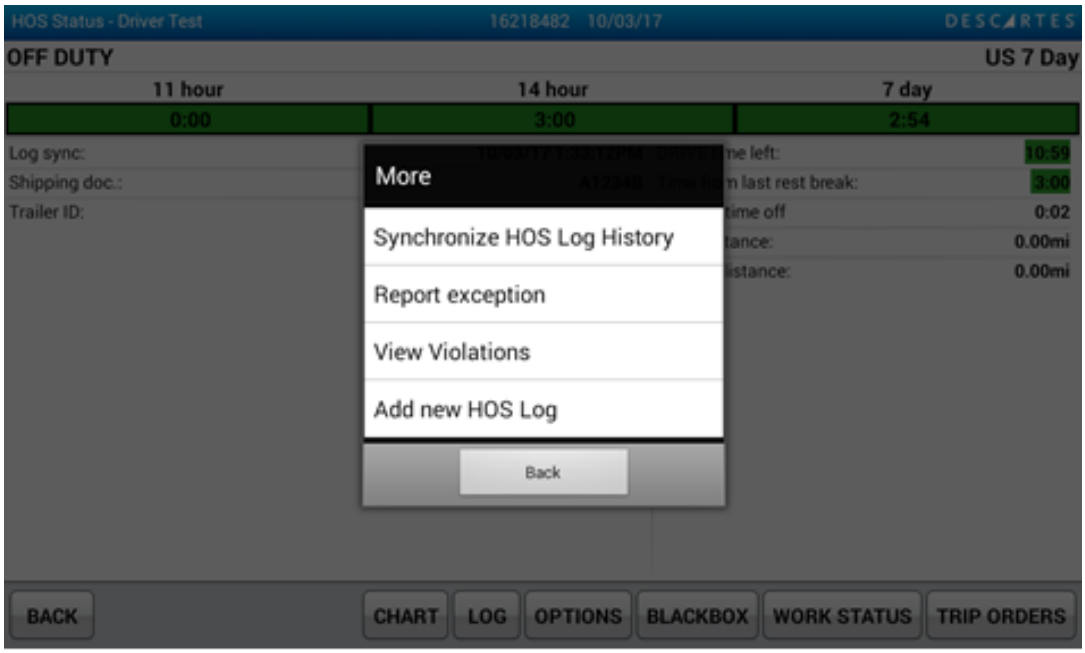
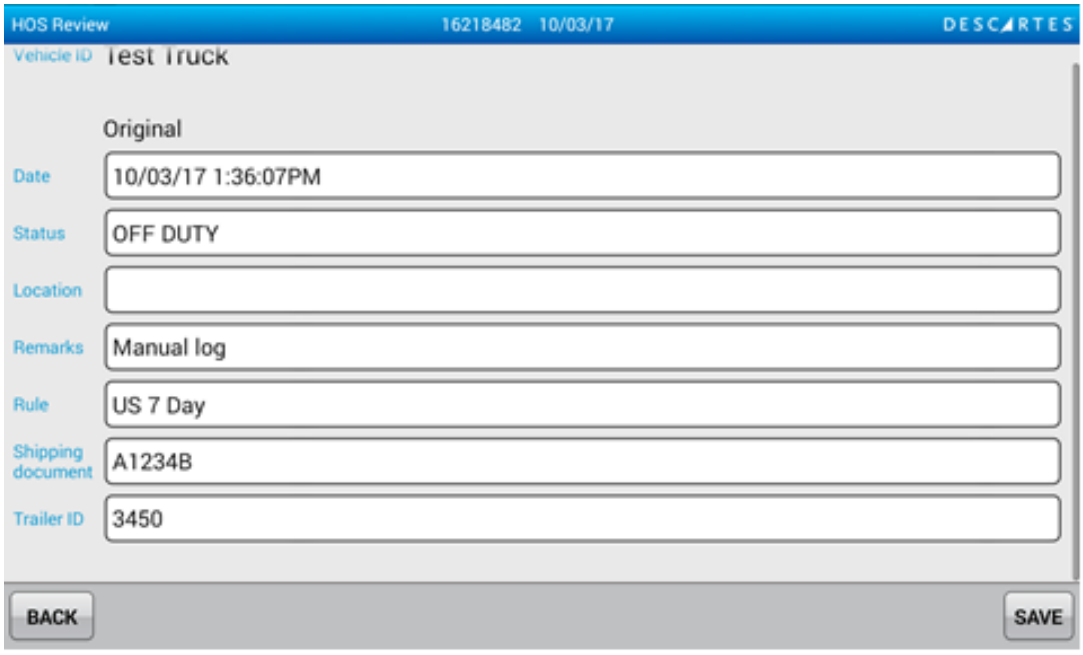
Creating a New HOS Log

To create a new HOS log:

1 Tap the **Options** button at the bottom of the **HOS Status** screen. The **HOS Options** screen appears.



2 Tap **Add new HOS Log**. The **HOS Review** screen appears.



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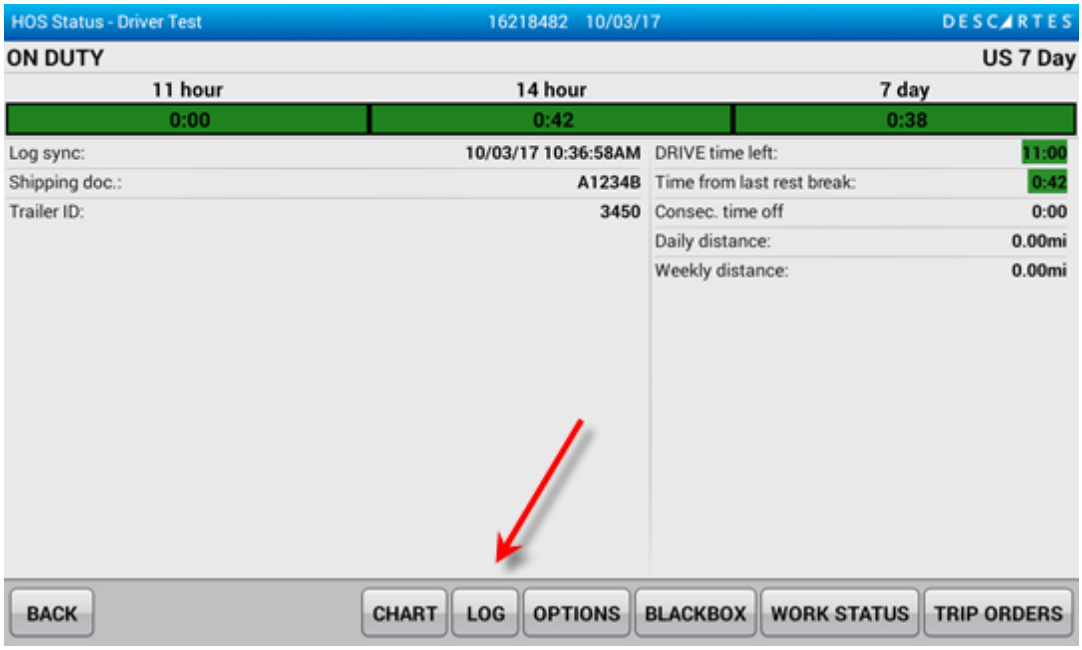
3 Current time, "Off Duty" status and Rule are automatically populated. Make any edits if necessary.

4 Tap the **Save** button to complete the new log. You can view the logs on the **HOS Log** screen.

5 Tap **Log** on the **HOS Status** screen.



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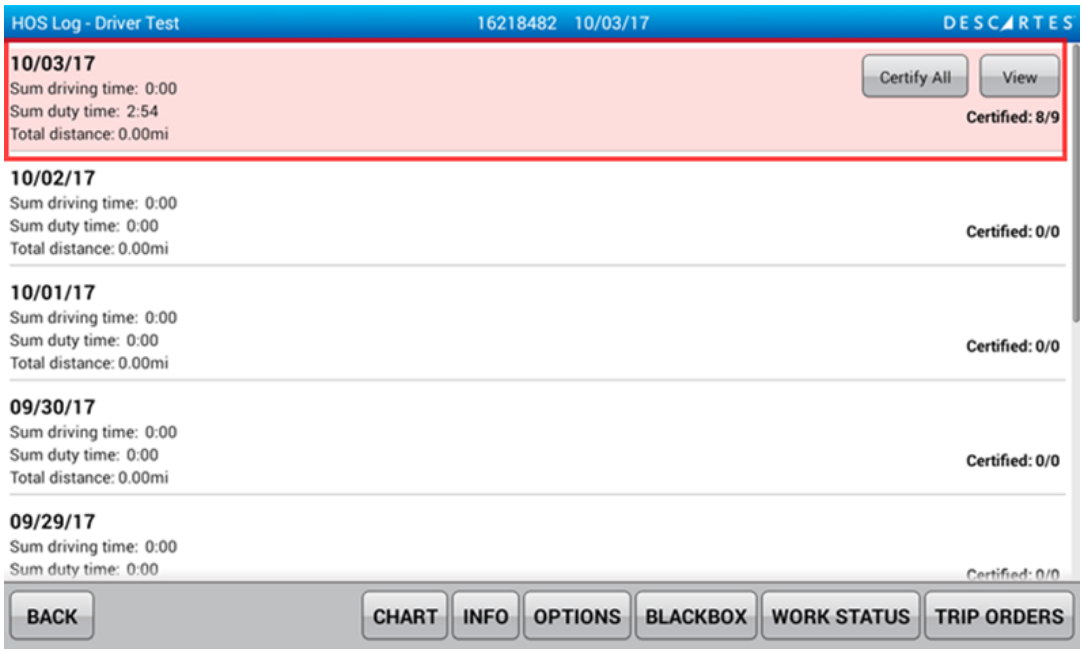
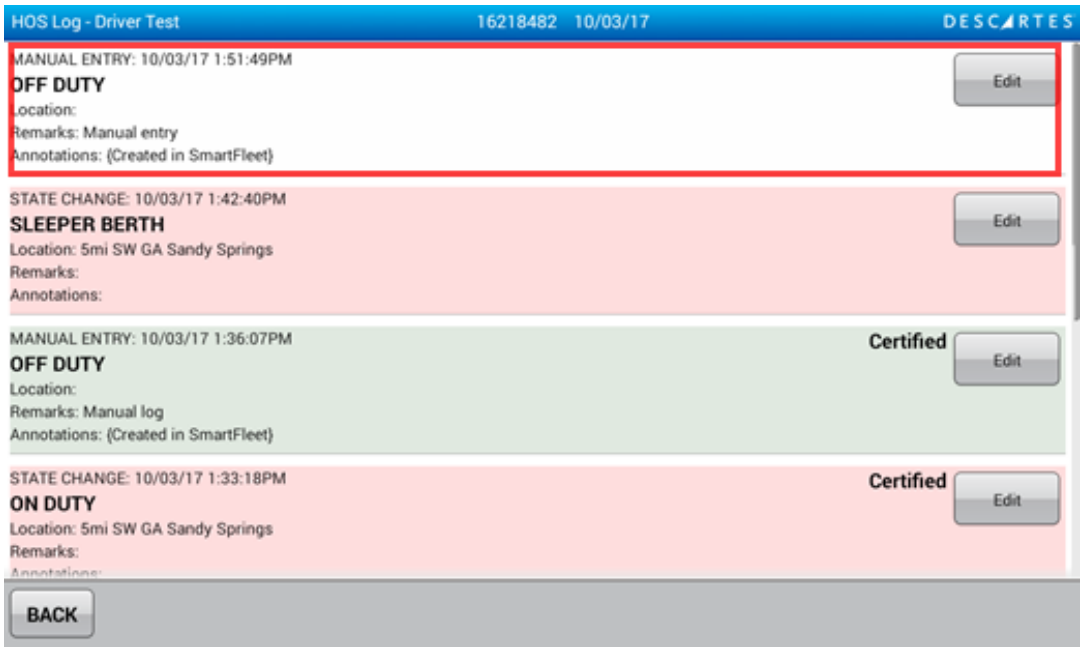
6 The **HOS Log** screen is displayed. Tap on the **HOS LOG** to select the day for which you want to check the log. Then tap **View**



7 Individual logs for that day are presented and can be edited, by selecting the **Edit** button.



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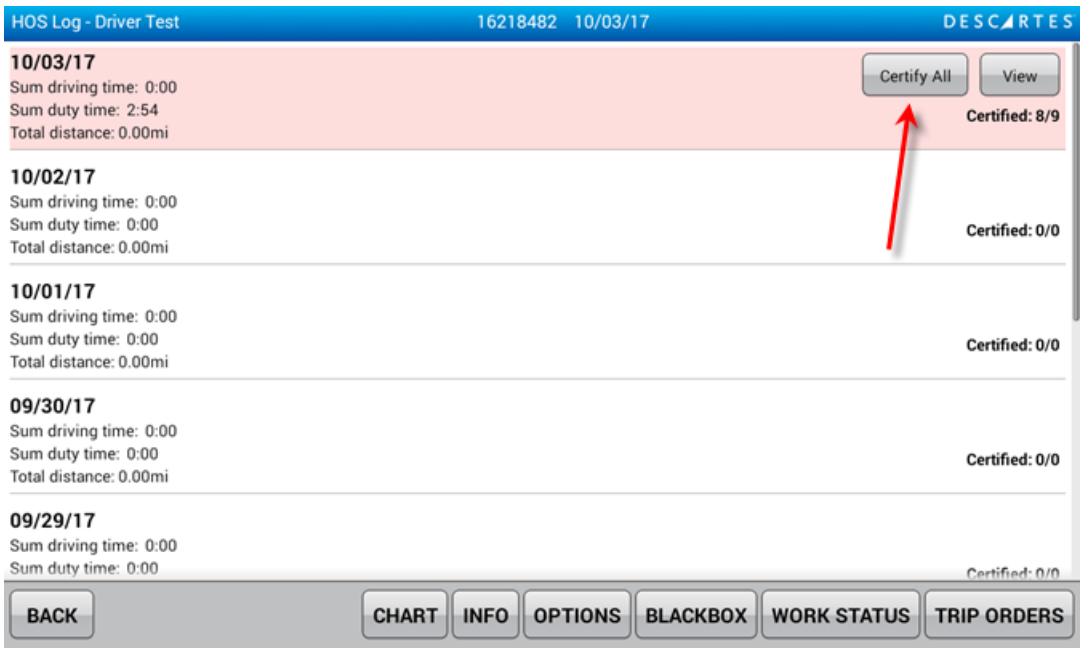
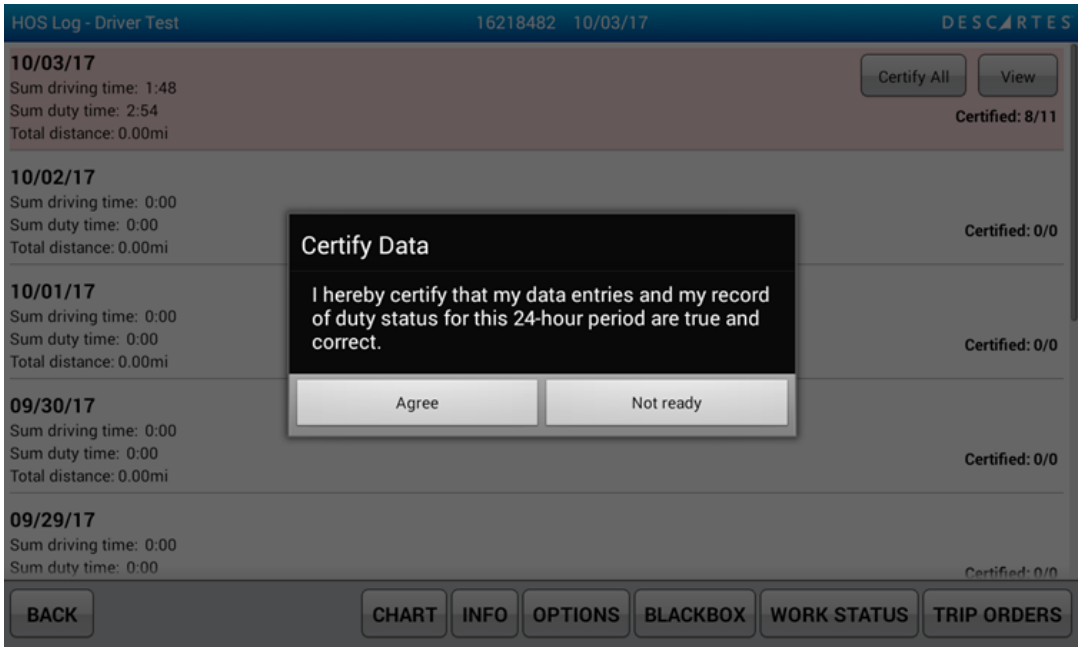
Certifying Logs

To certify logs for the entire day, tap the **Certify All** button on the initial **HOS Log** screen.



Tap **Agree** on the confirmation dialog to continue.



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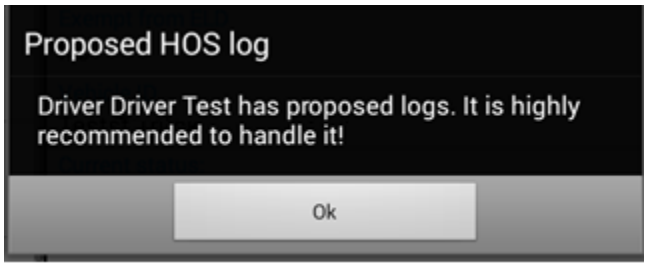
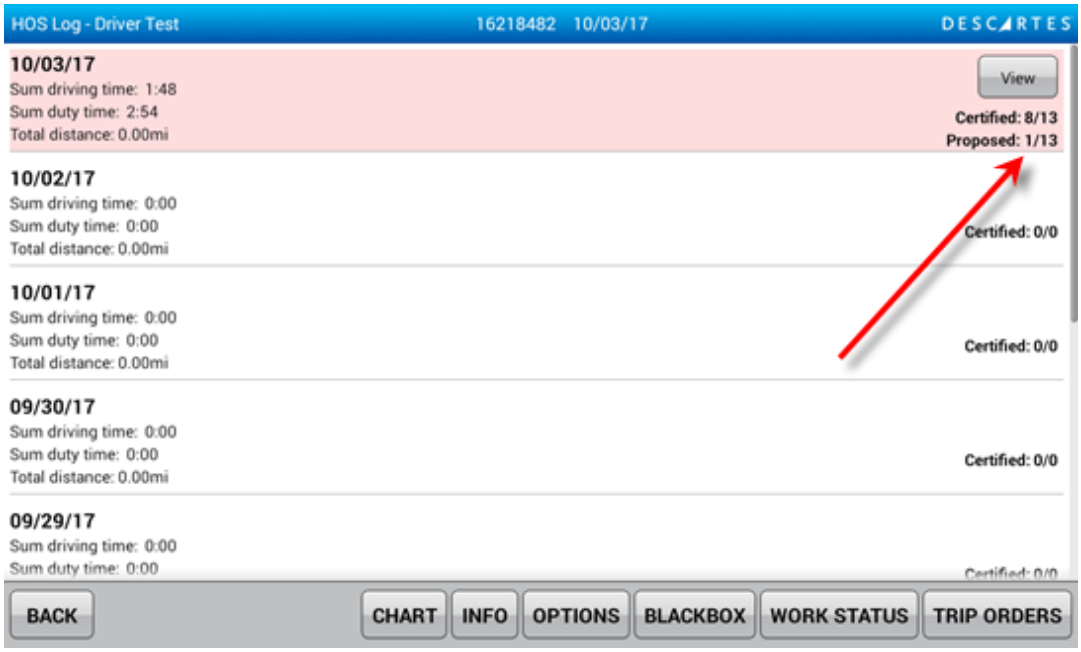
Reviewing and Certifying Proposed HOS Logs

In Descartes FleetCenter, when a supervisor proposes a new HOS log or edits an existing one in Descartes FleetCenter, the driver is notified in Descartes SmartFleet.



1 Tap **OK** to dismiss the notification and view the proposed logs. Tap the **View** button to display all logs for the selected day.



2 The **HOS Log** screen appears. Find the **Proposed Log**.

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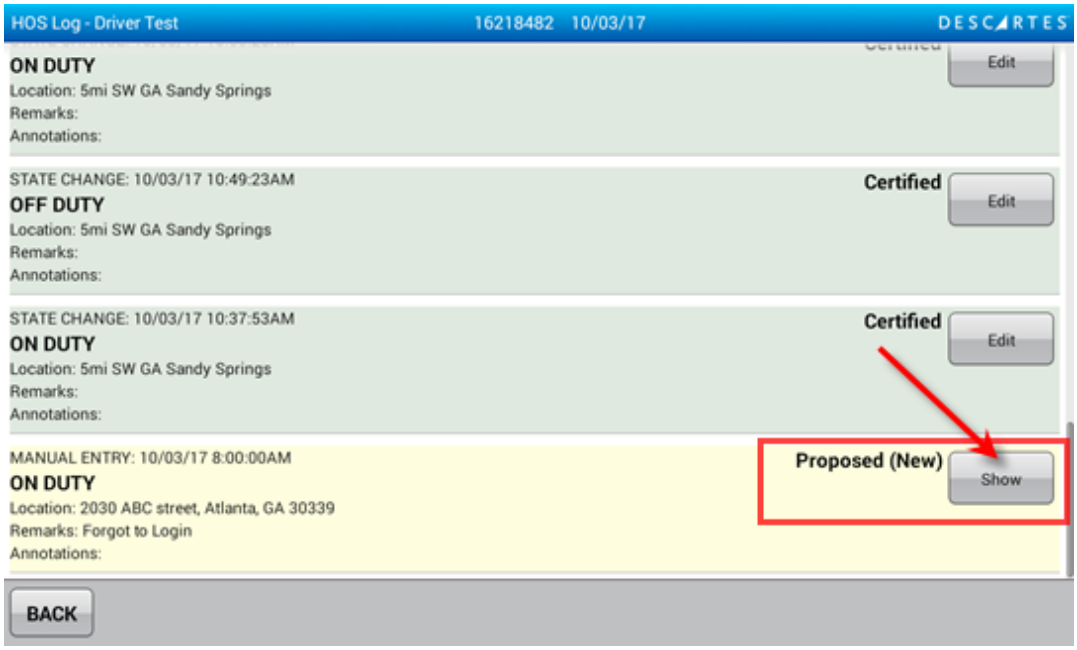
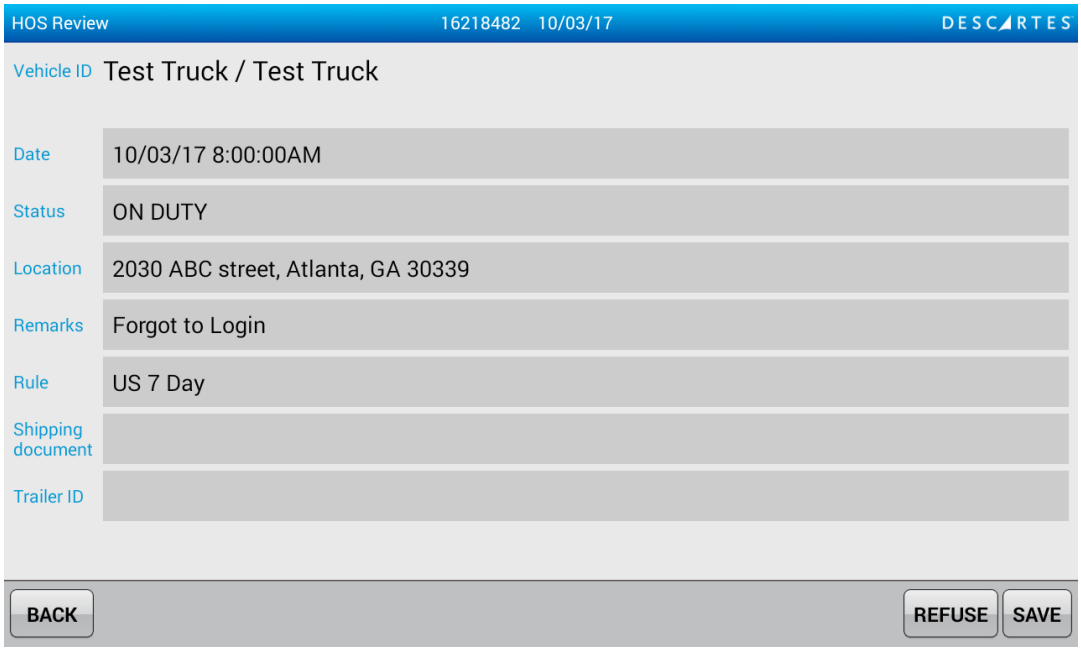


3 Tap the **Edit** button to review the log and make any necessary changes. The **HOS Review** screen appears.



4 Tap **Save** to save your edits or tap **Refuse** to refuse the log. When the log is saved, you can then certify the log.

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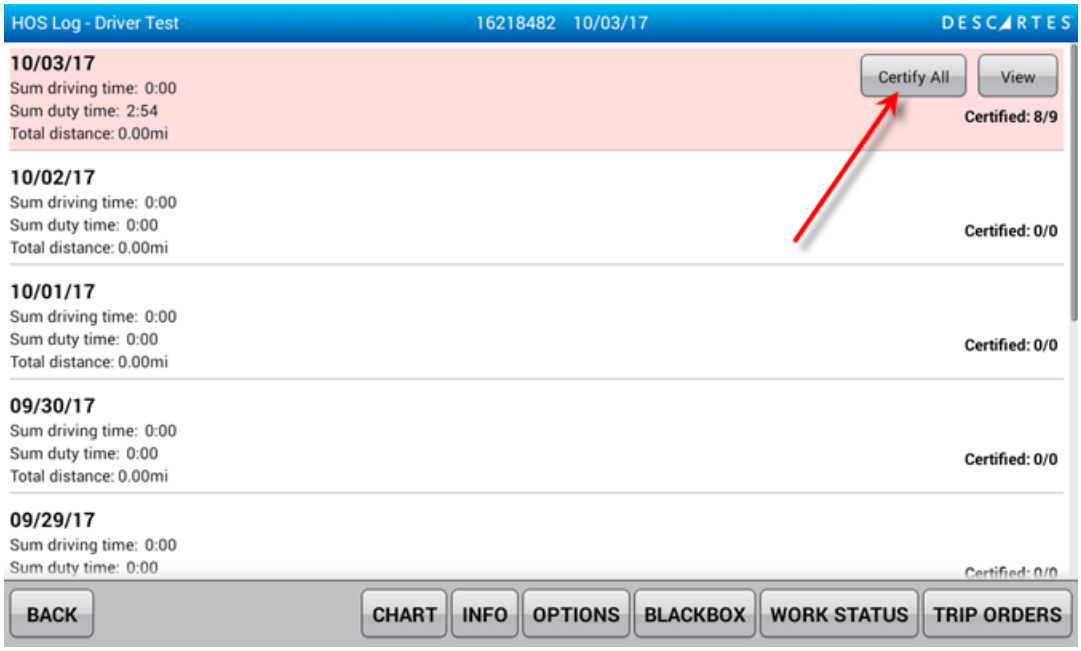
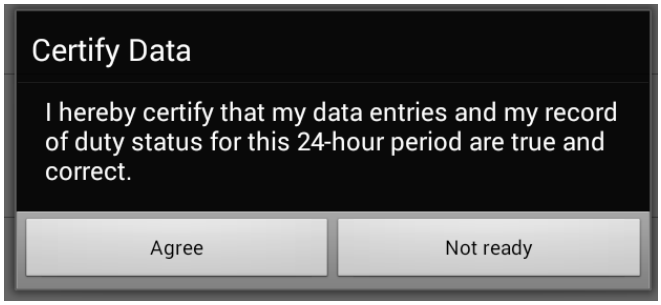
5 To certify logs for the entire day, tap the **Certify All** button.



Select **Agree** from the confirmation dialog. You can also postpone certification from this dialog by selecting **Not ready.**



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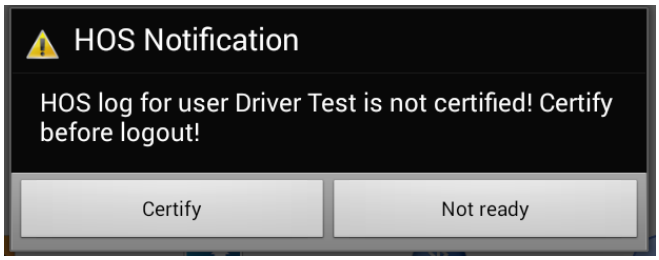
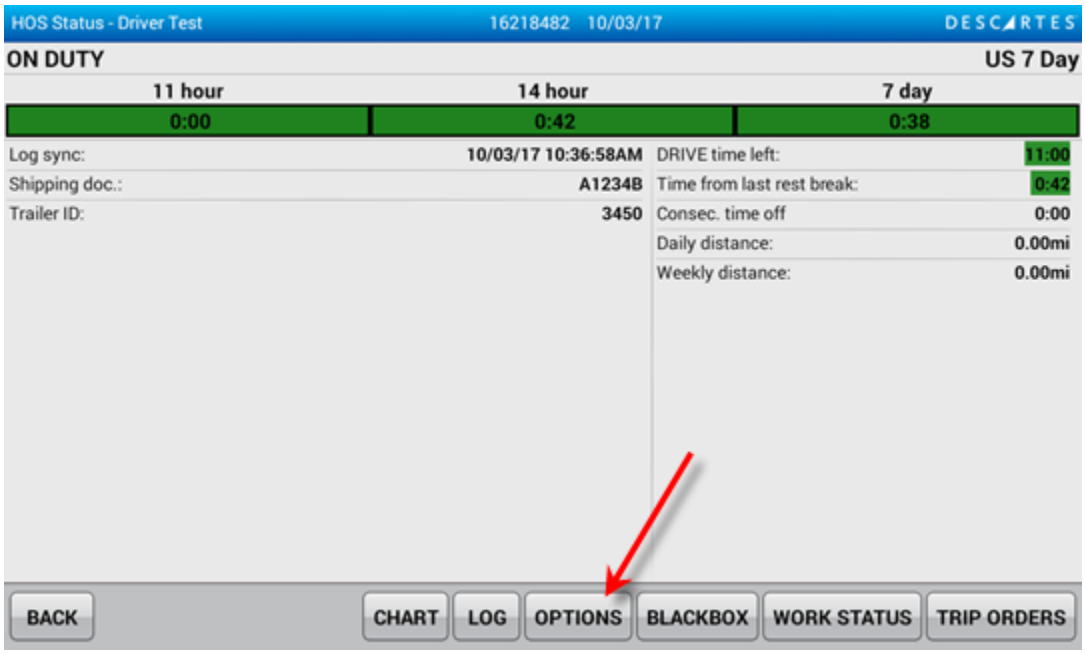
At the end of your day, if logs are not certified, you will receive a notification to certify all logs before logging out.



Reporting Exceptions

Users can report exceptions such as Adverse Condition or a 16-hour Exception from within the **HOS** screen.

1 Tap the **Options** button at the bottom of the **HOS Status** screen. The **HOS Options** screen appears.



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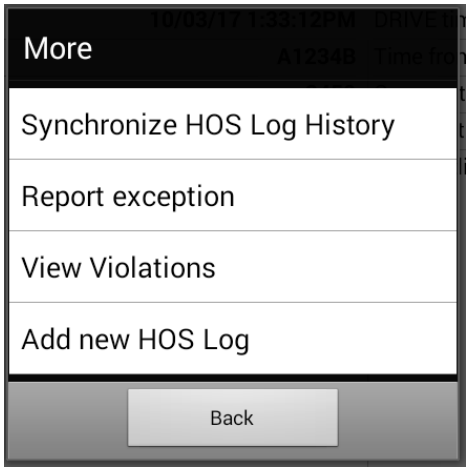
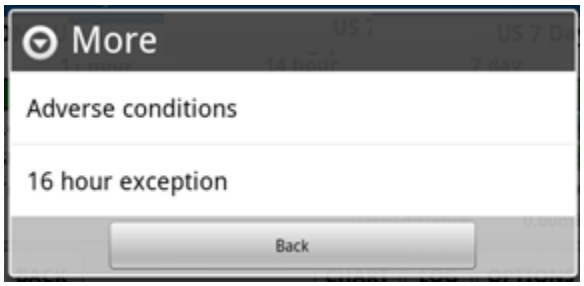
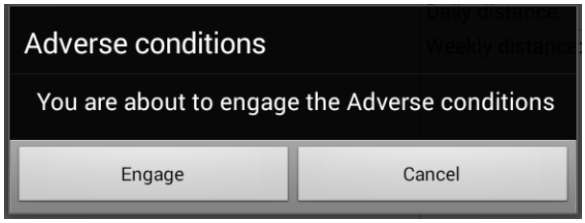
2 Tap **Report Exception**.



3 Tap the applicable exception from the **Report Exception** screen and enter appropriate Remarks.



4 You are asked to confirm the selection. Please tap to **Engage** or tap **Cancel** if you have made a mistake in selection.



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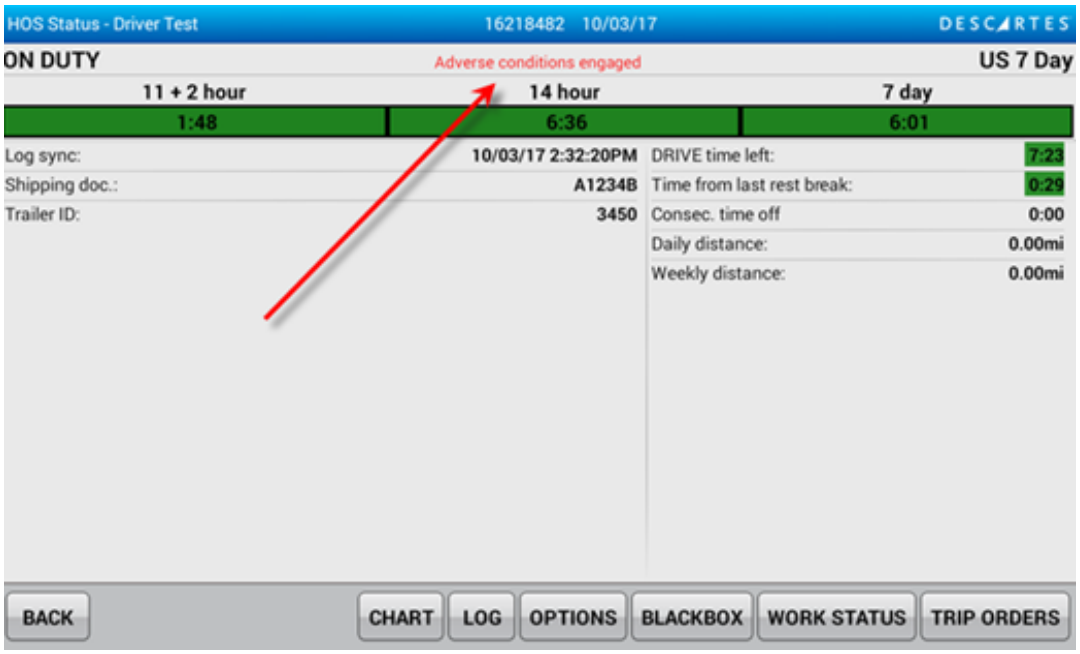
If Adverse Condition is selected, the **HOS Status** screen displays the message "Adverse Condition engaged".



The **HOS Chart** screen displays the Adverse Condition in red text.

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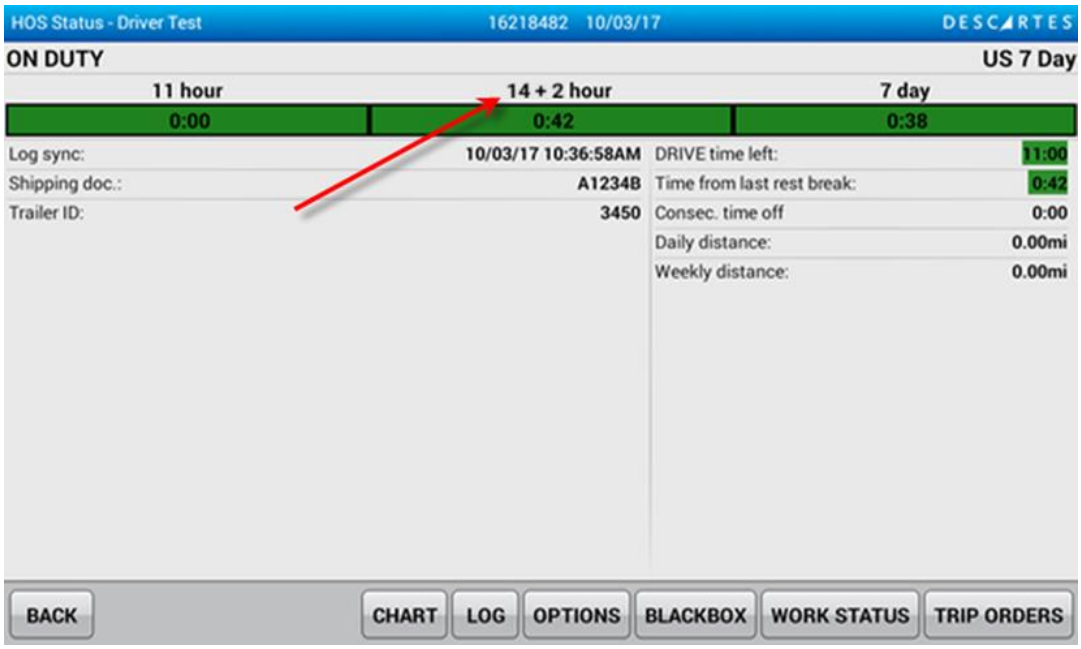
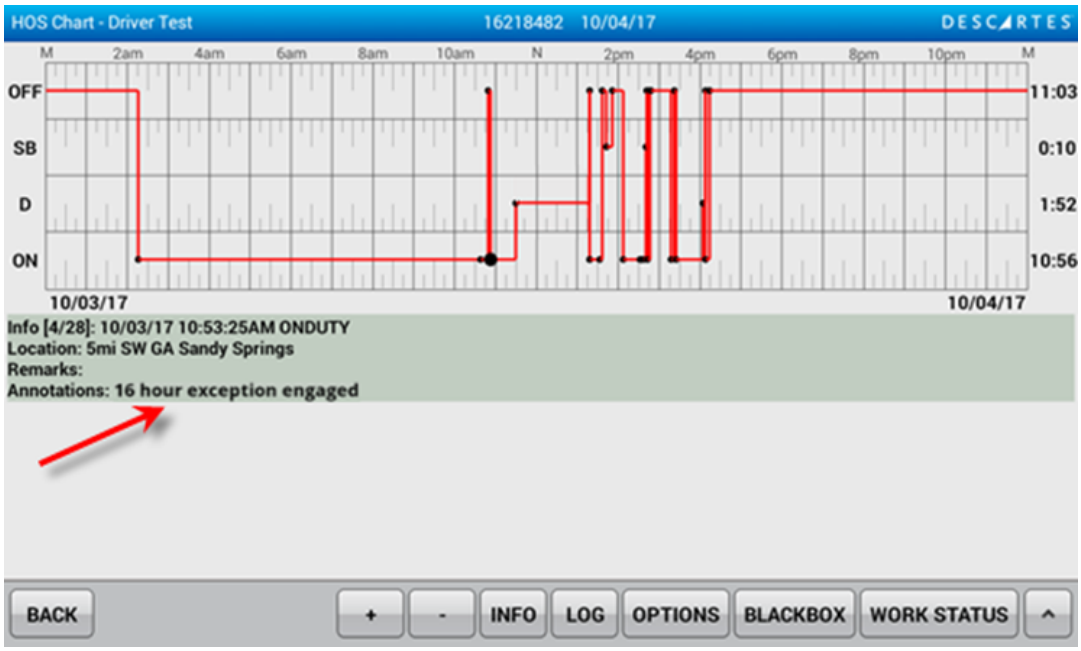
➲ **Note—** Users cannot enter a Remark associated with the Adverse Condition.

If 16-hour exception is selected, the exception is displayed in both the **HOS Status** screen and the **HOS Chart** screen.





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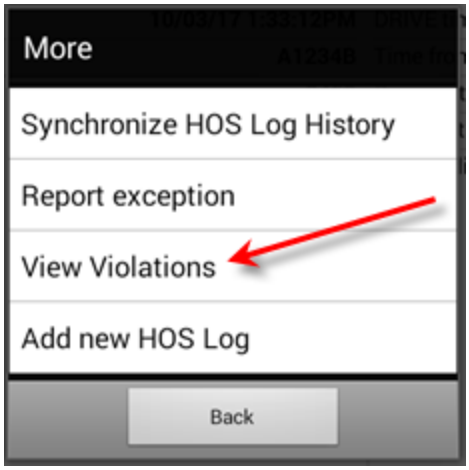
Viewing Violations

To view HOS violations in the system:

1 Tap the **HOS** icon from the main menu.

2 Tap **Options** button at the bottom of **HOS Status** screen. HOS Options dialog appears.



3 Tap **View Violations**. A list of recorded HOS violations appears.

HOS rules violations can also be viewed on the **HOS Chart** screen. The portions of the chart that are shaded in red represent violations of "On Duty" or "Driving" status.

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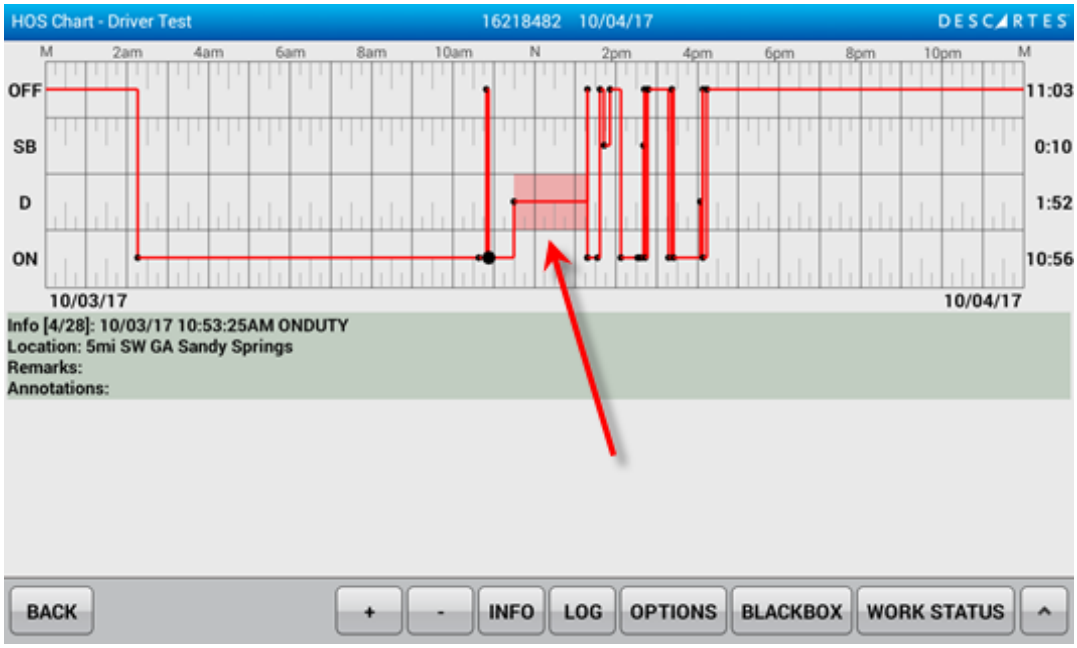
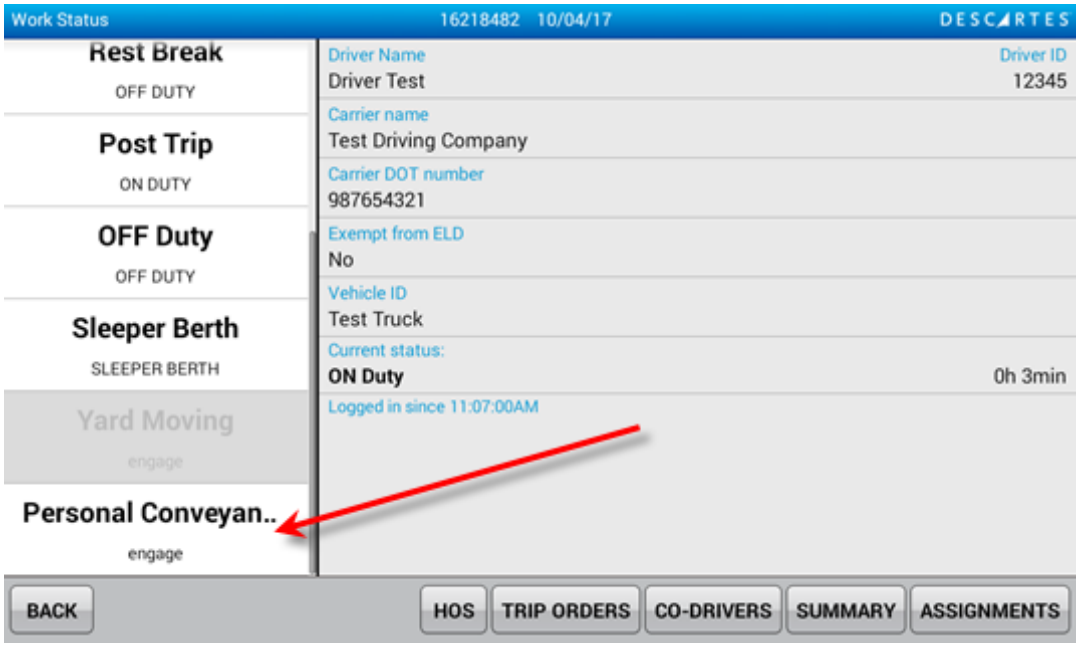


Personal Conveyance

If the "Personal Conveyance" status is configured, the **Work Status** screen displays the **Personal Conveyance** option. To identify Personal Conveyance use, select the **Personal Conveyance** option.



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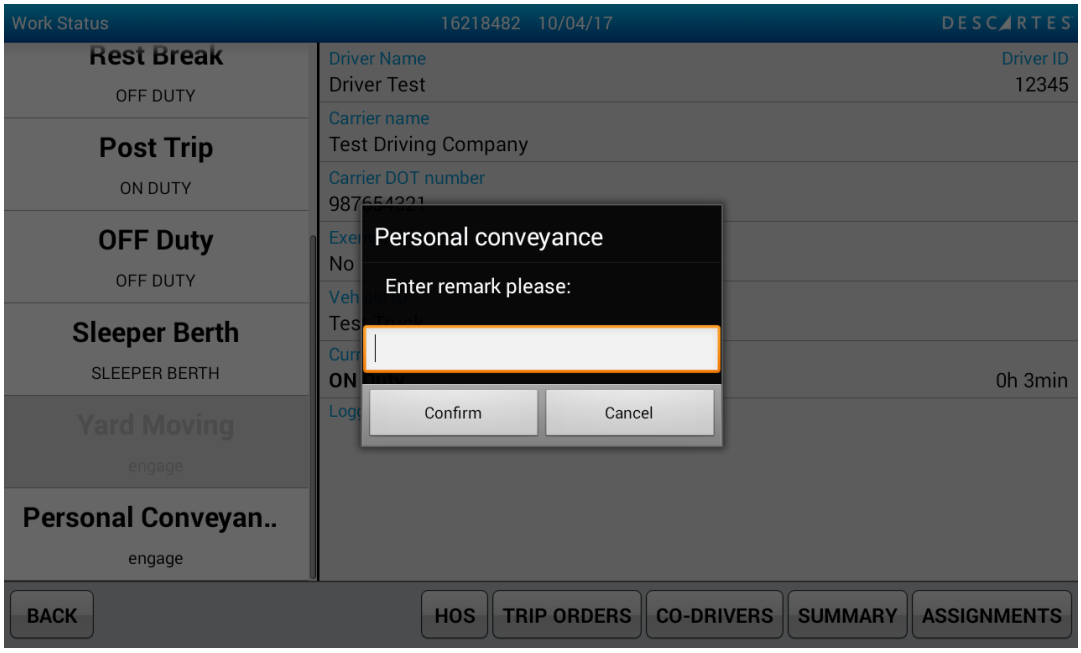
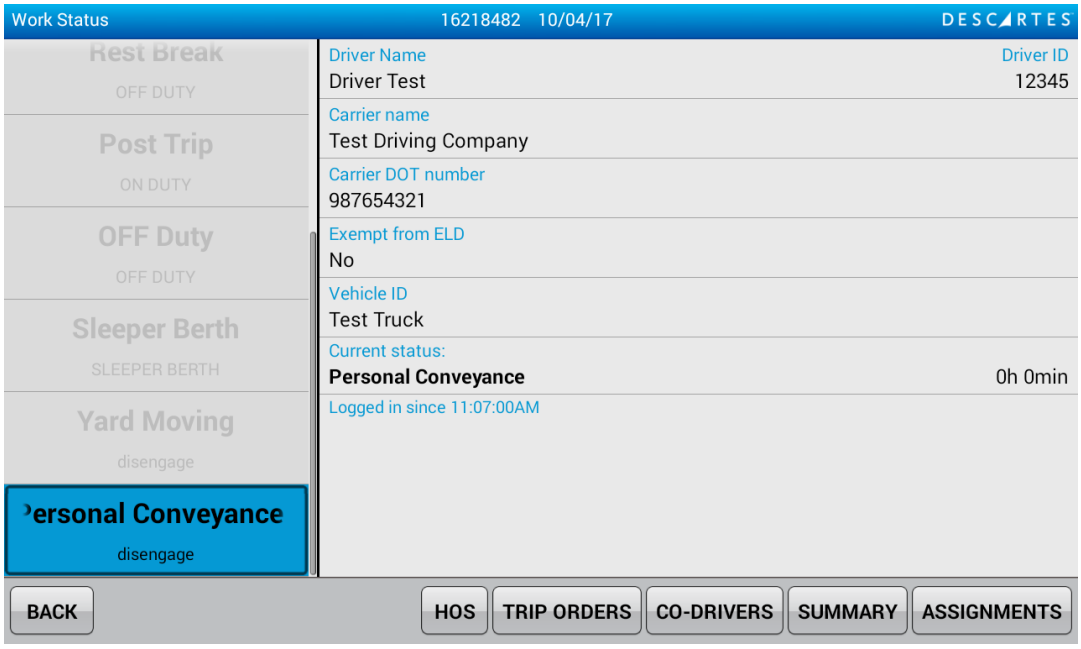
Users must enter a Remark associated with the Personal Conveyance Duty Status.



When Personal Conveyance is activated, it is highlighted and all other Duty Statuses are disabled.



Even when driving, the Personal Conveyance status remains engaged.

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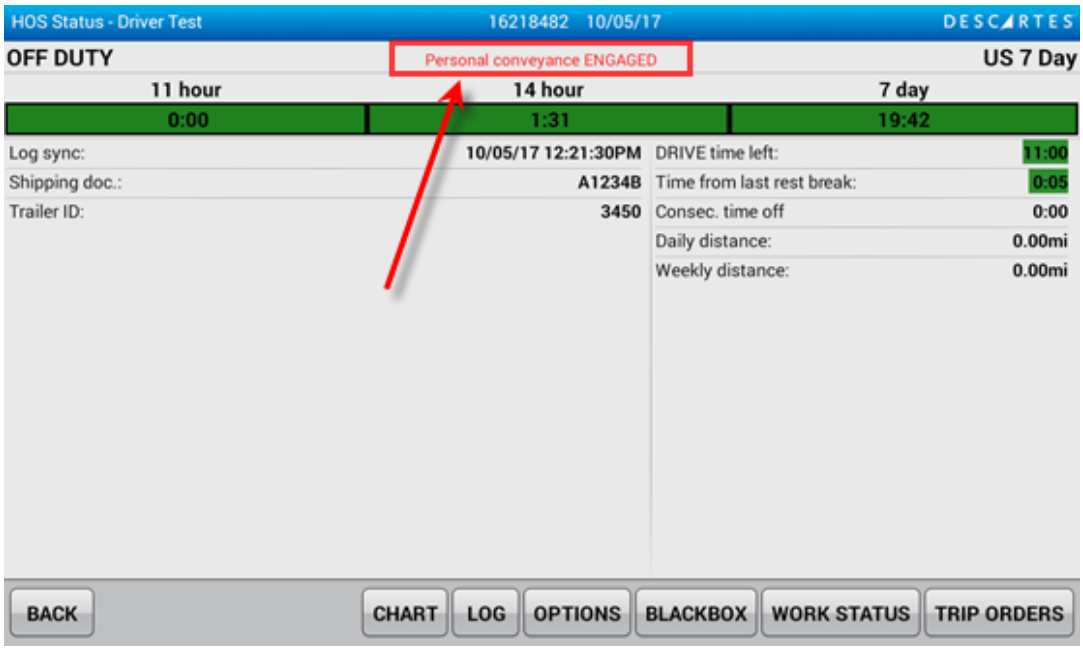
Descartes SmartFleet continues to record HOS while "Personal Conveyance" status is engaged and will identify Personal Conveyance in the **HOS** screen.



Note that the Personal Conveyance is indicated as "Off Duty" with a dotted line. In addition, the driver location associated with the HOS is recorded but offset to about 10 miles from the actual location.

If the engine goes through a Power Off cycle while Personal Use is activated, Descartes SmartFleet will ask the driver to confirm Personal use.

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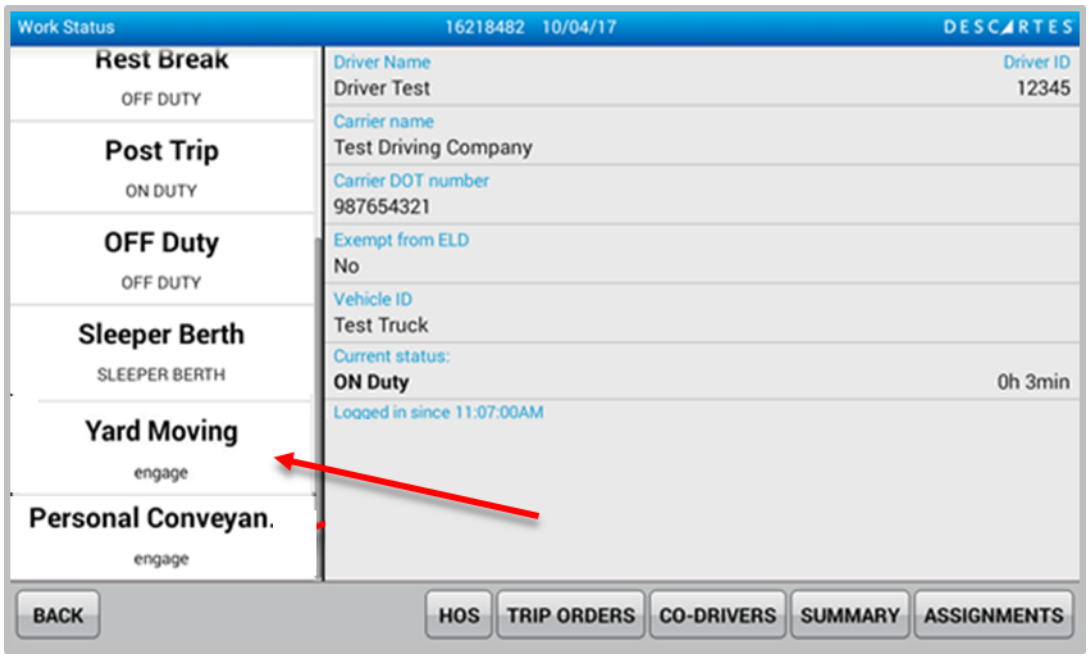
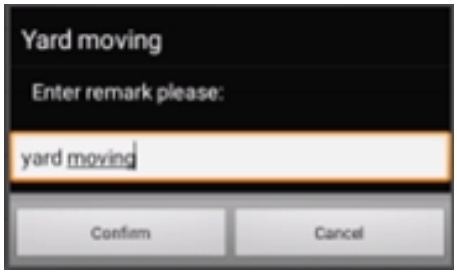
Yard Moving

If the "Yard Moving" status is configured, the **Work Status** screen displays the **Yard Moving** option. To identify Yard Moving use, select the **Yard Moving** option.



Users must enter a Remark associated with the Yard Moving Duty Status.



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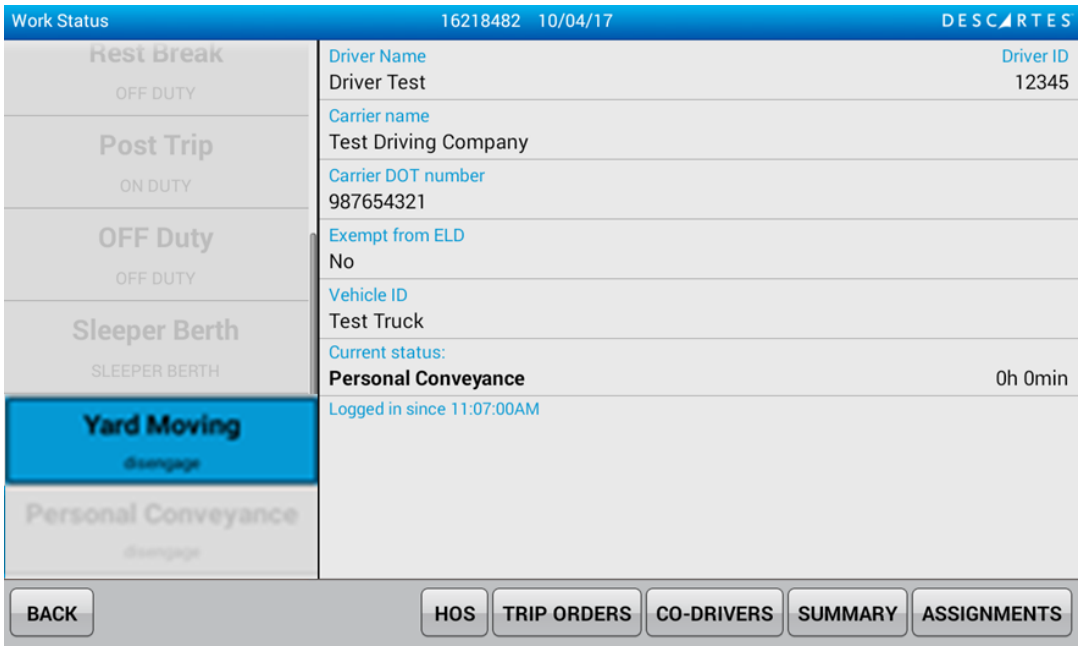
When Yard Moving is activated, it is highlighted and all other Duty Statuses are disabled.



Even when driving, the Yard Moving status remains engaged.

Descartes SmartFleet continues to record HOS while "Yard Moving" status is engaged and will identify Yard Moving in the **HOS** screen. Note that the Yard Moving is indicated as "On Duty" with a dotted line.

The user should disengage **Yard Moving** when finished this activity. To disengage Yard Moving, select the Yard Moving disengage option.

If the engine goes through a Power Off cycle while Yard Moving is activated, Descartes SmartFleet disengages Yard Moving.

Warnings

Warning messages will display to notify the driver of possible HOS rule violations such as:

- Daily driving time
- Daily on duty time
- Weekly on duty time
- 30-minute rest break

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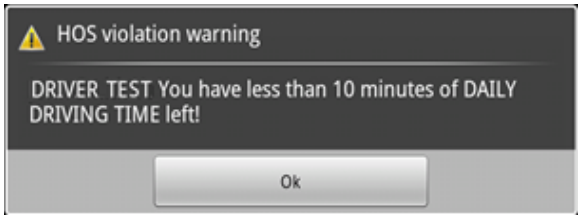
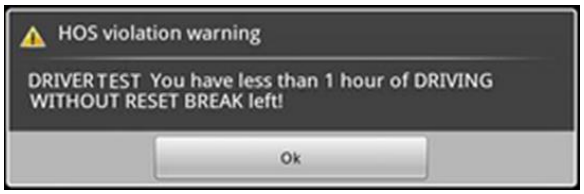


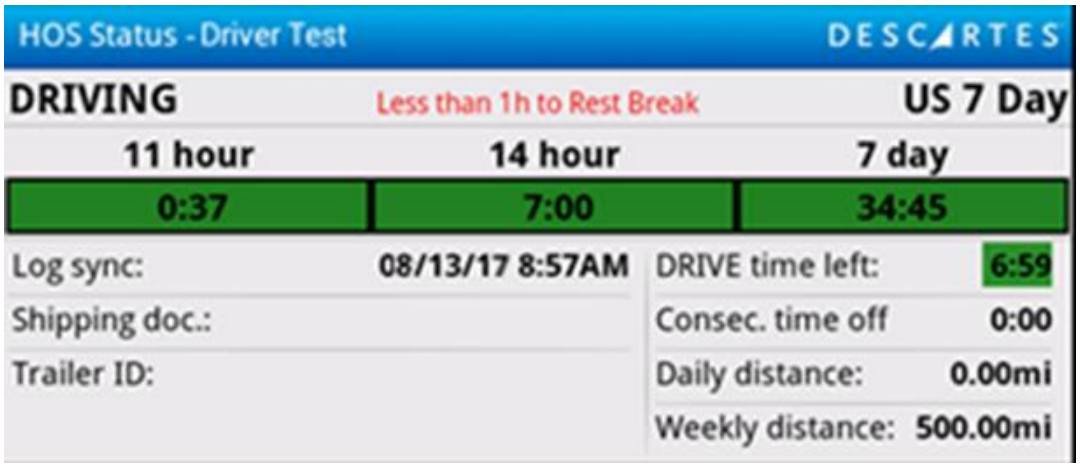
Once the driver enters the last hour of a certain available status, a warning will display. Rest Break warnings are described below.

Rest Breaks

After seven hours from going On Duty, if the driver is driving and has taken no breaks since going On Duty, the system will issue warnings (pop-up messages) to the driver. An audible alert is also emitted.



These warnings are received 60, 30, and 10 minutes before the actual violation occurs.



➲ **Note—** Warnings are not displayed if you are in "On Duty" status.

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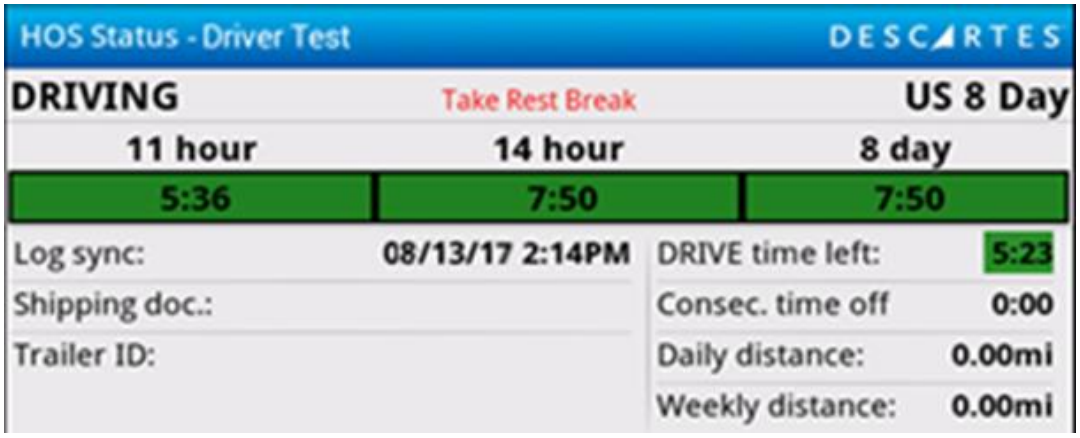

If you do not take a break or start driving without having taken a break in the previous eight hours, the system displays a violation alert.

Co-Drivers

Login

The co-driver must login *before* the vehicle is in motion. To add one or more co-driver(s):

1 Tap the **Co-Drivers** icon on the Descartes SmartFleet Main Menu

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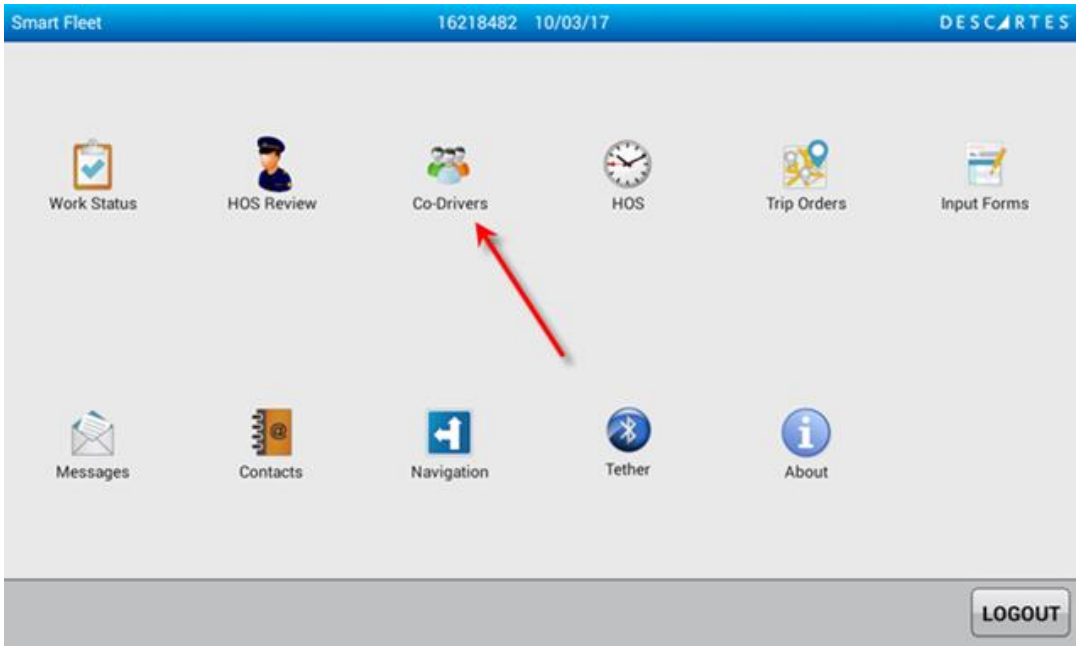
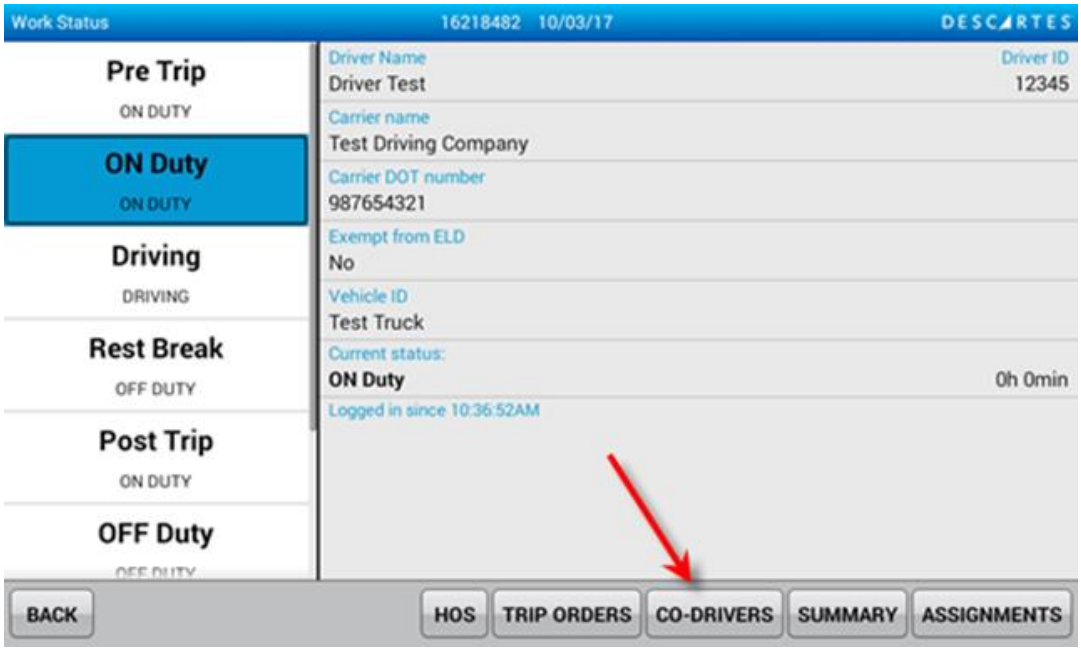


Or,

Tap the **Co-Driver** button on the **Work Status** screen

.



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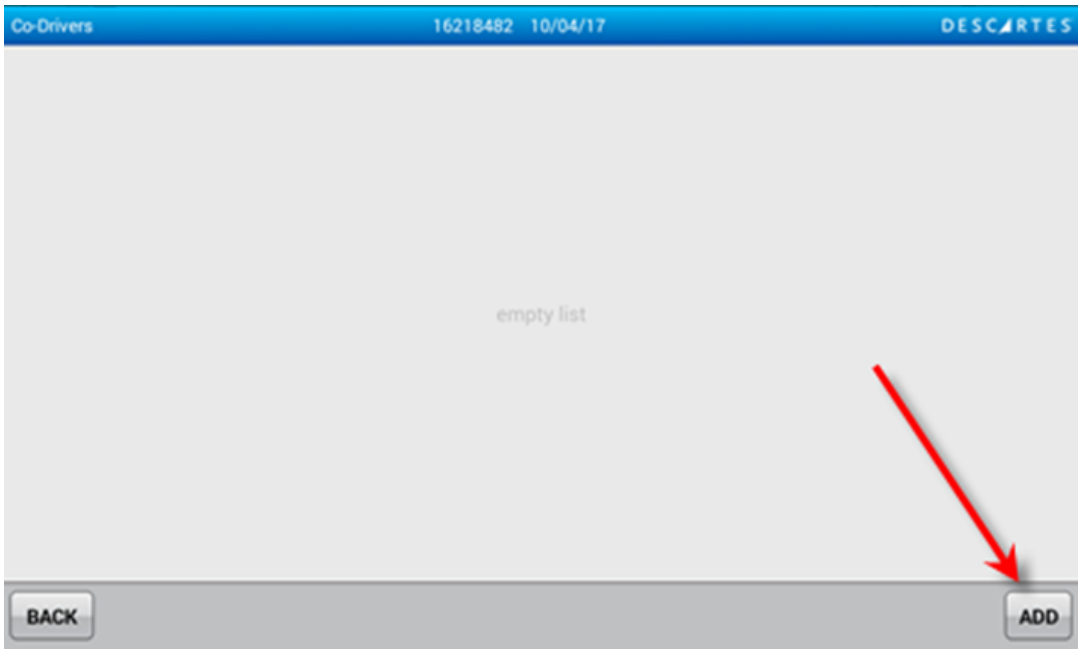
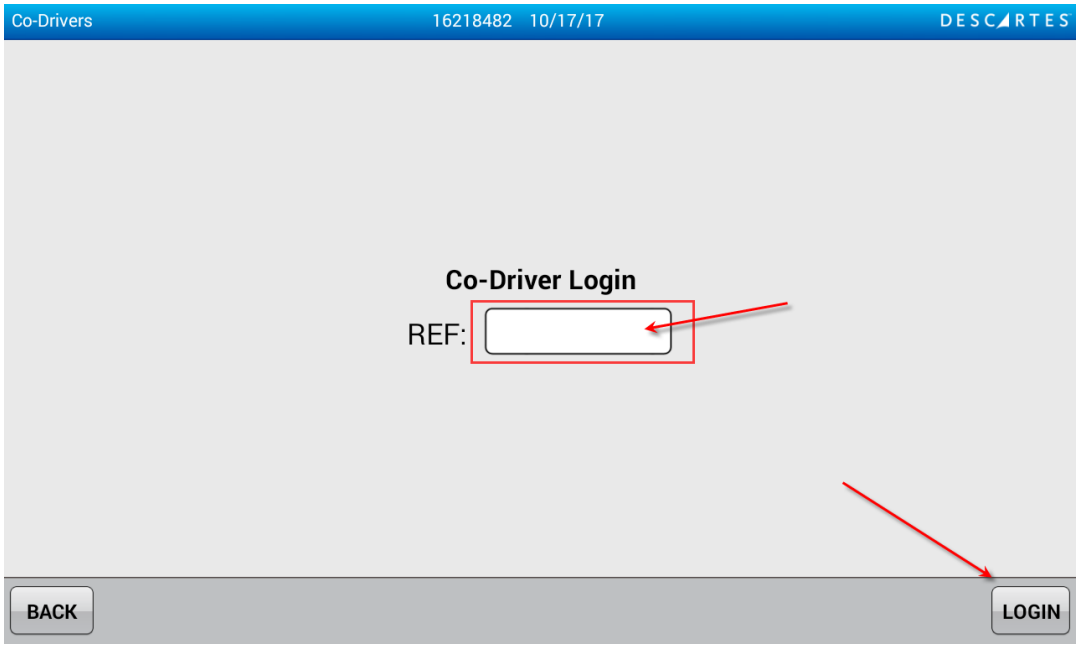
The **Co-Drivers** screen opens. If there are no Co-Drivers logged in then the **Co-Drivers** screen is empty.

2 Tap **Add**.



3 The co-driver can enter his or her PIN or reference number in the Login field and tap the **Login** button.



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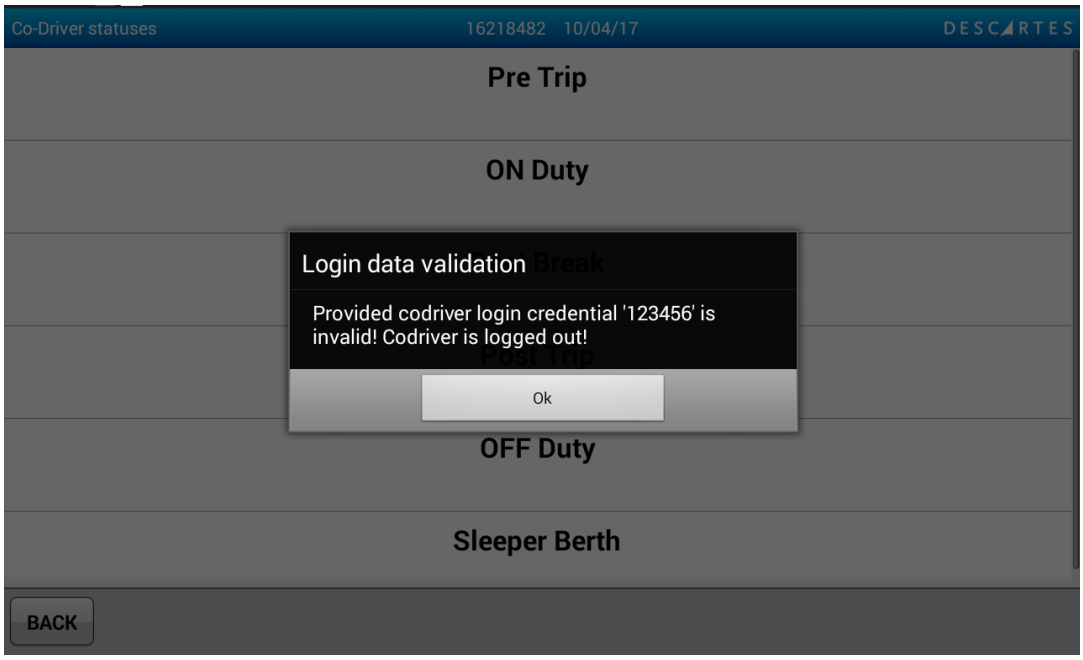
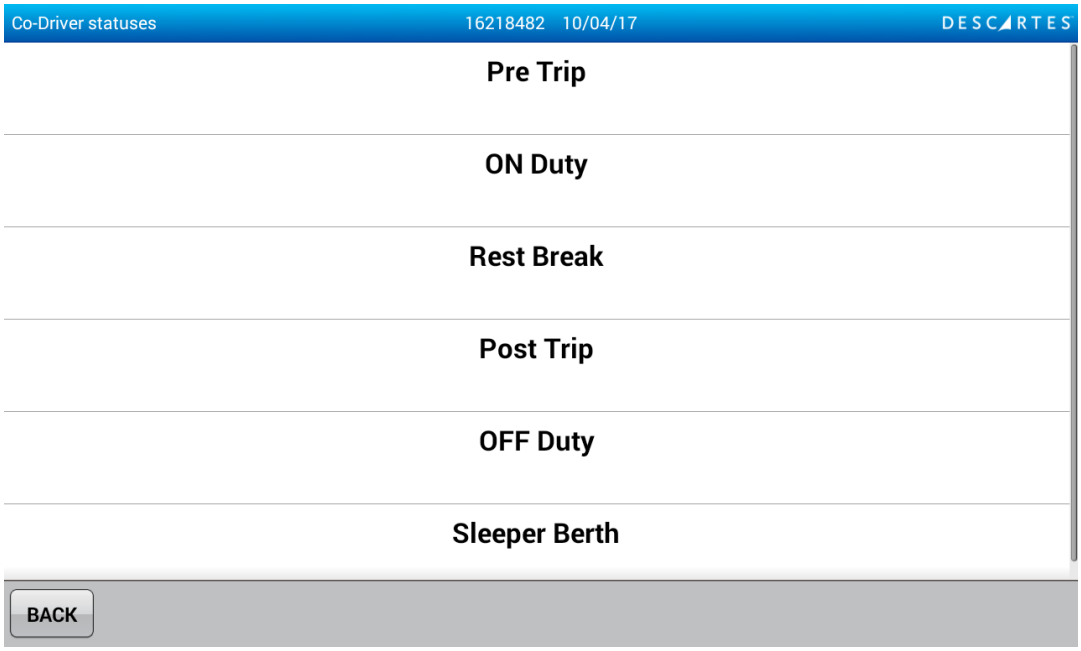
Only co-drivers with a valid PIN or reference number can login; otherwise the following notification appears.



Upon successful login, the **Co-Drivers Status** screen is displayed.



The solution will not allow a co-driver to login while vehicle is in motion. When the vehicle is in motion the screen is locked and does not permit user interaction.

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Work Status

As a minimum, the following Work Status options are available to the co-driver:

- Off Duty
- Sleeper Berth
- On Duty Not Driving

The co-driver may also have the following statuses if configured:

- Yard Moving
- Personal Conveyance

The "Driving" status is not available to the co-driver at this point. The co-driver must swap with the Driver and become the Driver before "Driving" status is available. This is described in the *Swap Drivers* section.

To use the **Work Status** screen:

1. The co-driver taps the applicable status.
2. The co-driver's **Work Status** screen opens listing co-driver(s) with the current Duty Status.
3. Additional co-drivers can be added by selecting the **Add** button and repeating the steps listed in the previous section.

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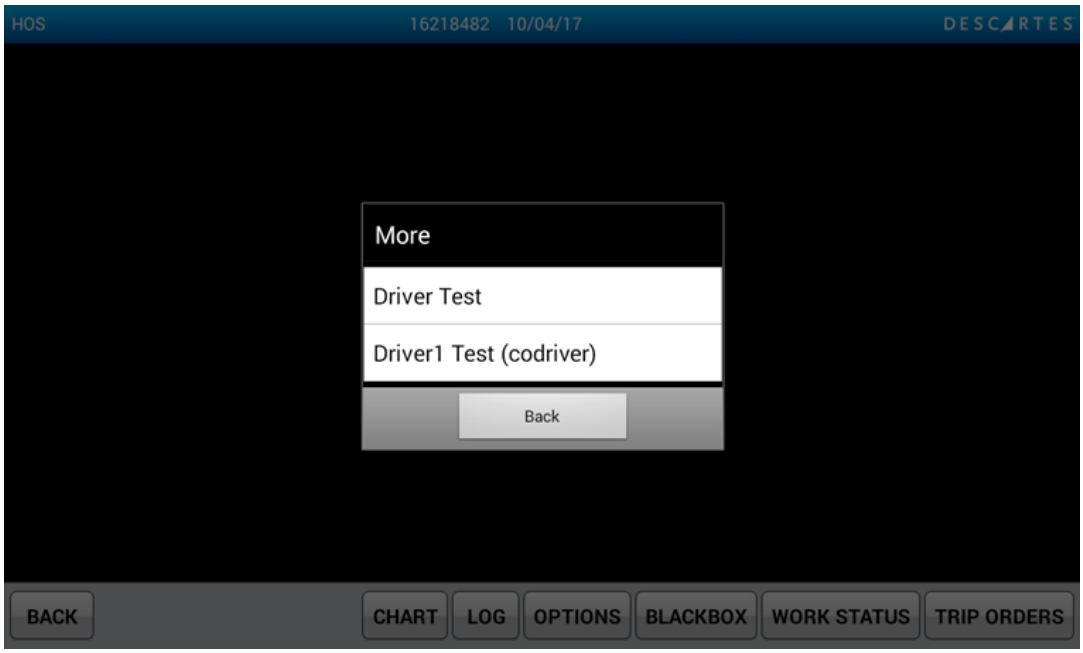
HOS

Co-drivers can review their HOS logs and make edits.

1 Select the **HOS** icon.

2 Select the applicable driver/co-driver name listed in Logged in Users (applies only if co-driver(s)are logged in). The selected driver's **HOS Status** screen appears.



3 The co-driver can view and certify logs as described in the *Reviewing and Certifying Proposed HOS Logs* section.

If the vehicle is in motion, Descartes SmartFleet prevents the co-driver from viewing/editing/certifying his logs.

Swap Drivers

Drivers and co-drivers can switch role so that the Driver becomes the co-driver and vice versa. This swap is only permitted when the vehicle is not in motion.

1 To swap the driver tap on the co-driver's name in the **Work Status** menu

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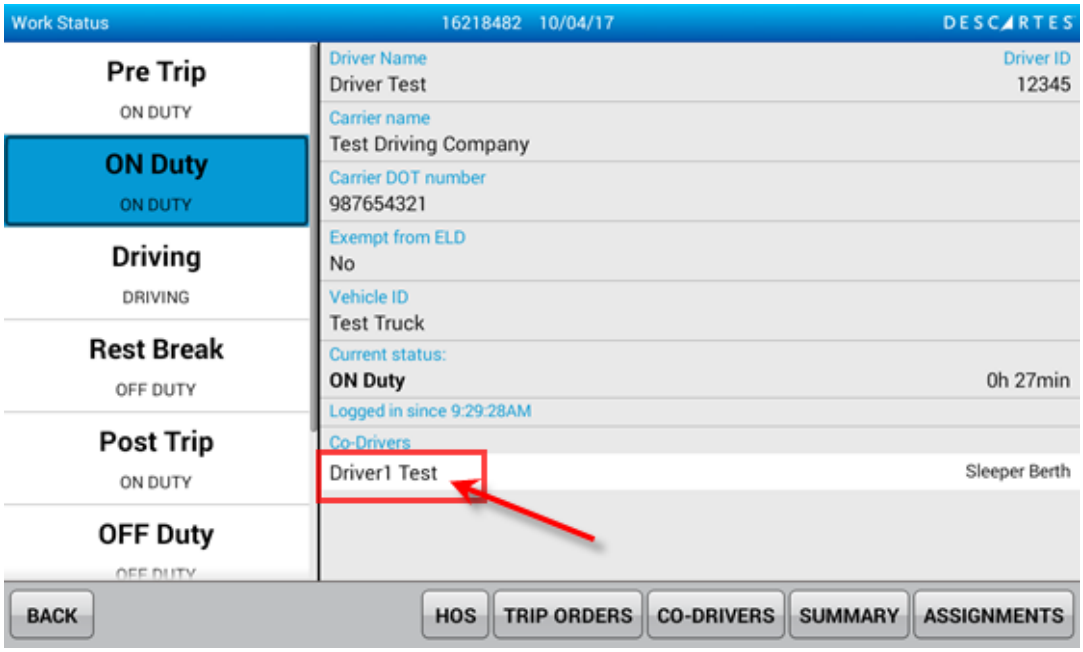
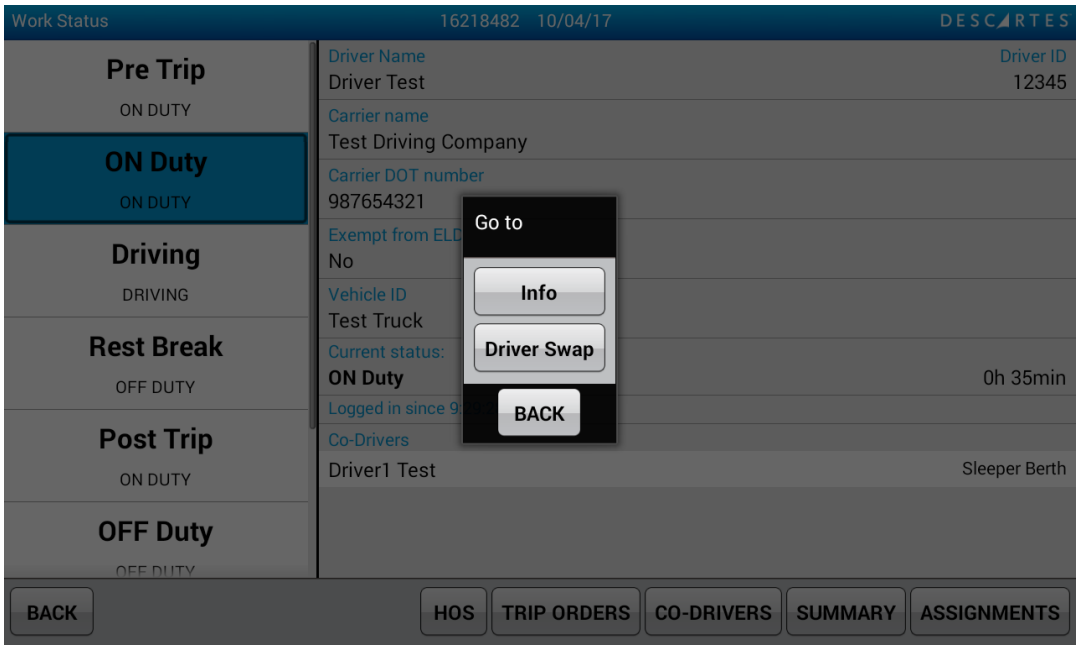


2 Tap on the Driver Swap



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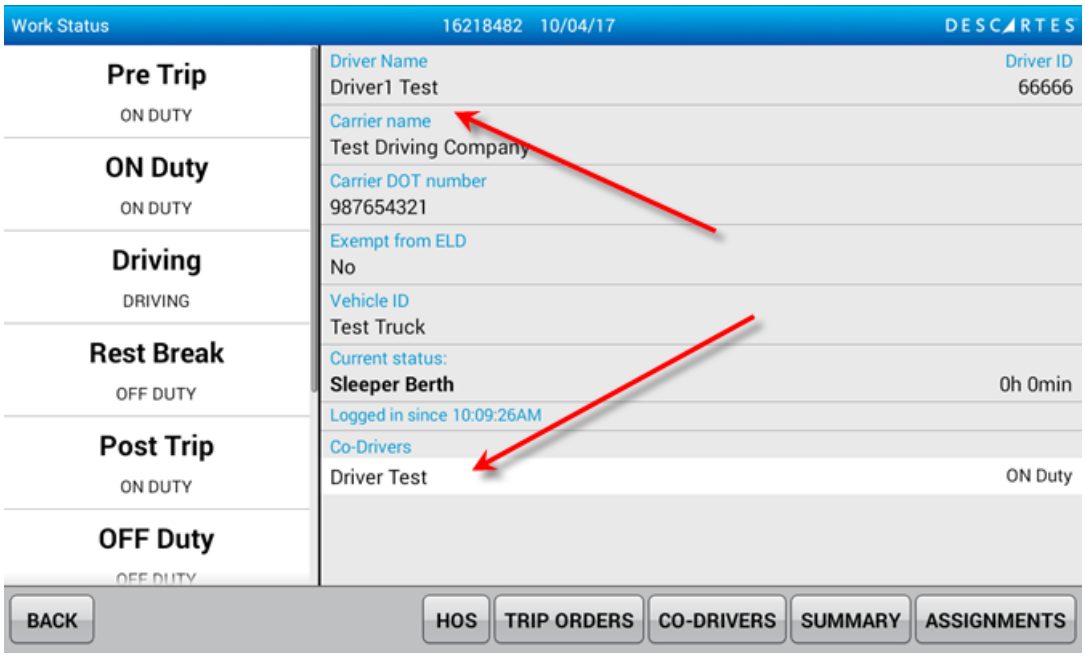
3 The co-driver now becomes the main driver and the previous main driver is now a co-driver



After the swap, the Driving Duty Status will be available to the initial co-driver (now Driver) and no longer available to the initial Driver (now co-driver).

The ELD does not allow co-drivers to switch driving roles when the vehicle is in motion.

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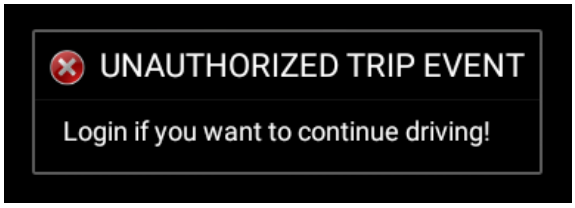
Unidentified Driver

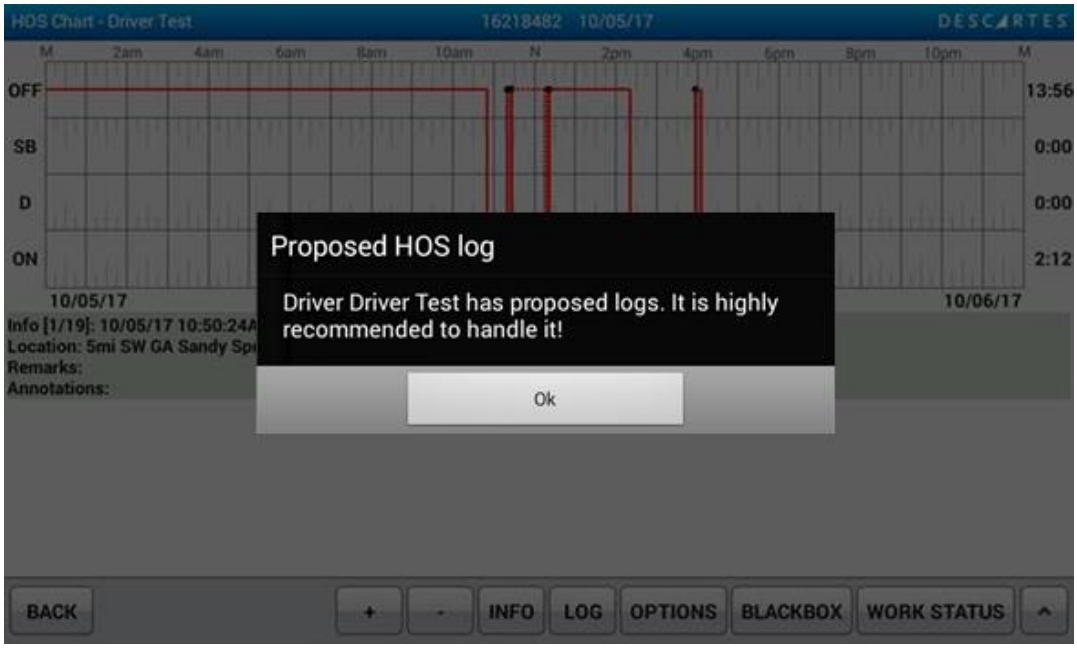
Descartes SmartFleet detects the vehicle in motion. If the vehicle is in motion and a Driver has not logged in, Descartes SmartFleet informs the user of the following and an audible tone is emitted:



The driver must dismiss the dialog and login in.

If the Driver does not login, HOS Logs are recorded against an Unidentified Driver.

Unidentified Driver Logs can be proposed to a driver by a back-office staff and the driver has the option to Accept those HOS Logs or Refuse them.



The Proposed Logs are automatically annotated to inform that they are **Proposed from Unidentified Driver**.

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If the HOS Logs are accepted, the driver will still need to review and certify his logs as described in the *Reviewing and Certifying Proposed HOS Logs* section.

HOS Review

The **HOS Review** option allows an authorized safety official to review HOS reports and receive HOS reports via email for the selected driver or an unidentified driver for the current 24-hour period and/or any of the previous seven consecutive days, irrespective of the vehicle operated by the driver and without entering the commercial motor vehicle; the display may be untethered from its mount and passed outside of the vehicle for a reasonable distance.

The display device should be handed to the Safety Official with the Cab Card that provides instructions on how the HOS reports can be viewed.

To use this functionality:

1 Select the **HOS Review** icon on the **Main Menu**.

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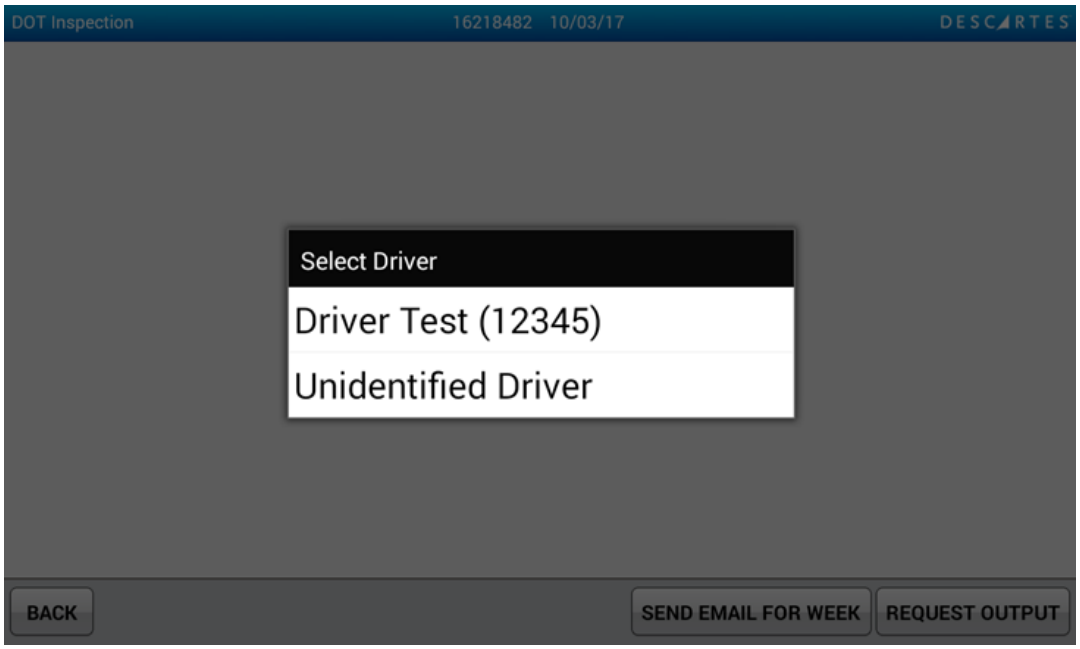
2 Select the driver reference number or the **Unidentified Driver** option.



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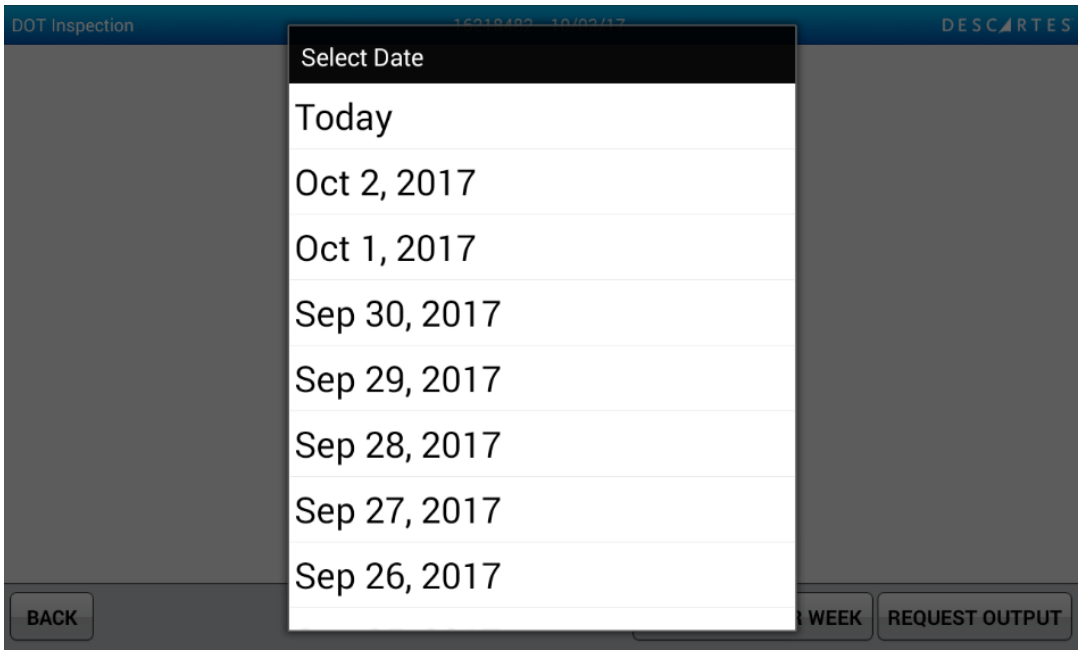
3 Select the date for records that you wish to view. The current 24-hour period can be selected (**Today**) or one of the previous seven days**.**



A header is displayed with the following information:

- Record Date
- Carrier DOT number
- Driver Name
- Driver License number
- License Issuing State
- Start and End Odometer
- Miles Today
- Start and End Engine Hours
- ELD Manufacturer
- Shipping Document Number
- Trailer Id
- Tractor VIN
- Carrier Name

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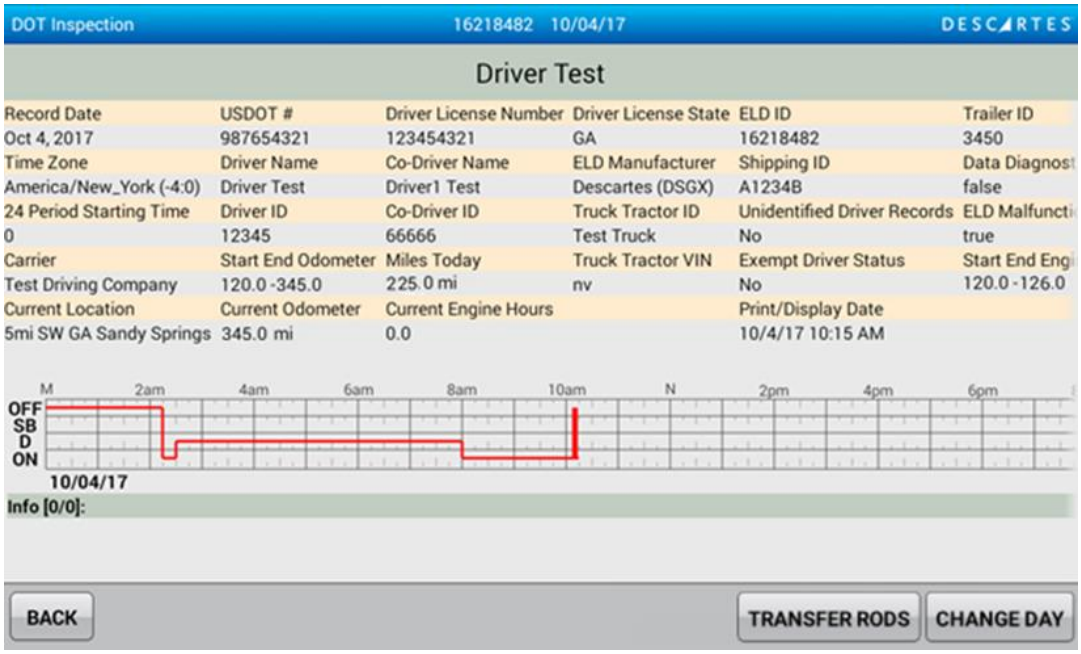

Depending on the size of the device's screen, the Safety Official may need to swipe left to view all this information.

Below the header, view the **HOS Graph**. The following is overlaid on the graph:

- **Total hours -** Total Hours in working day so far
- **Off duty –** Total Hours logged with "Off Duty" status
- **Sleeper Berth -** Total Hours logged with Sleeper berth status
- **Driving -** Total Hours logged with Driving status
- **On duty not driving -** Total Hours logged with On Duty not driving status
- **Miles Today –** Vehicle Miles Driven today

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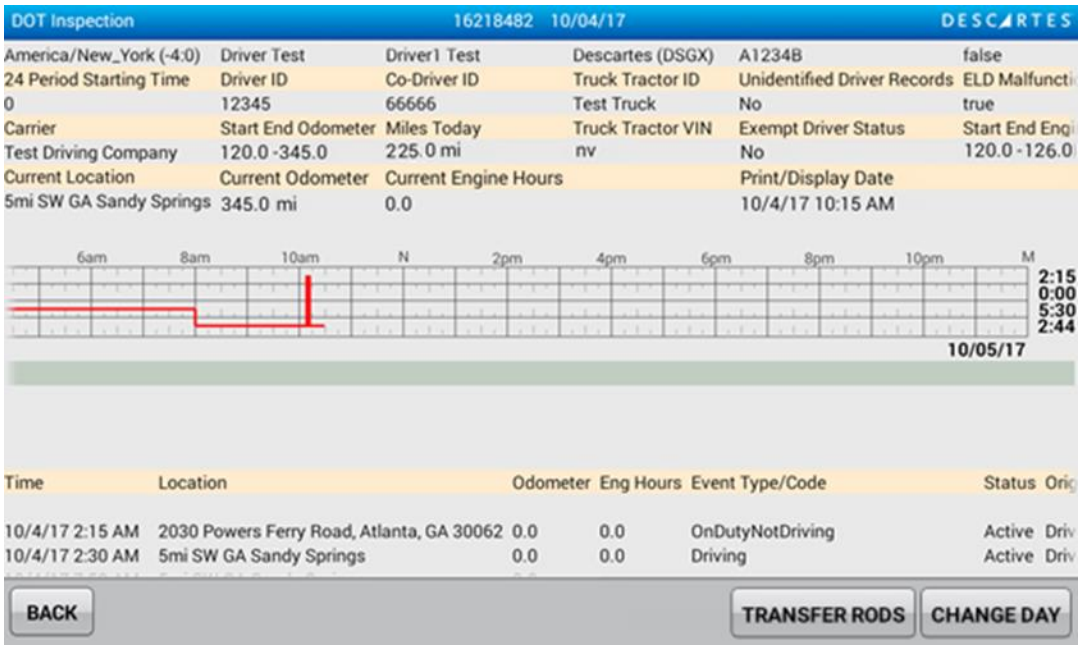

Swipe up to view the details of each HOS Record. The following is displayed for each record in driver's report:

- Time
- Location
- Odometer
- Engine Hour
- Event Type
- Origin
- Remark/Annotation

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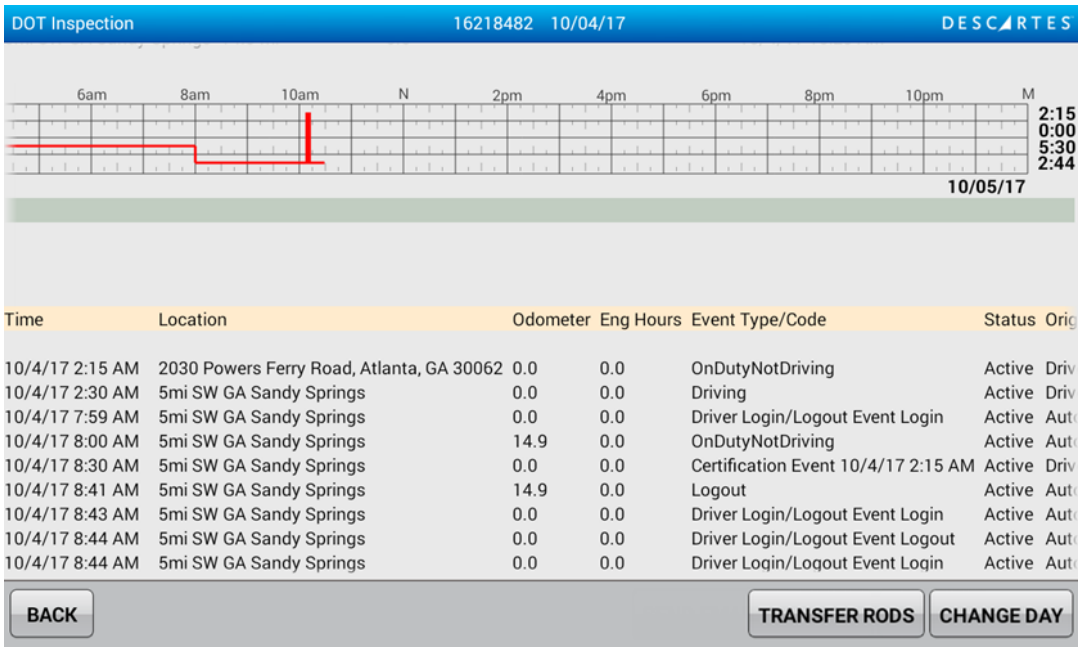


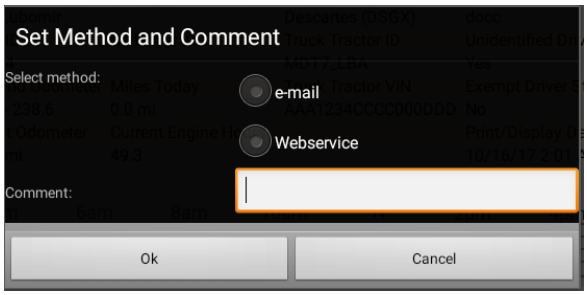
Depending on the size of the device's screen, the Safety Official may need to swipe left to view all this information.

Transfer of ELD Records

The Safety Official can transfer the records via email or Web Service to the FMCSA.

To transfer the records:

1. Select the **Transfer RODS** button.
2. The Safety Official is prompted to select the method of transfer and enter an optional comment:



The comment entered will be included with transferred HOS Logs when they are transferred.

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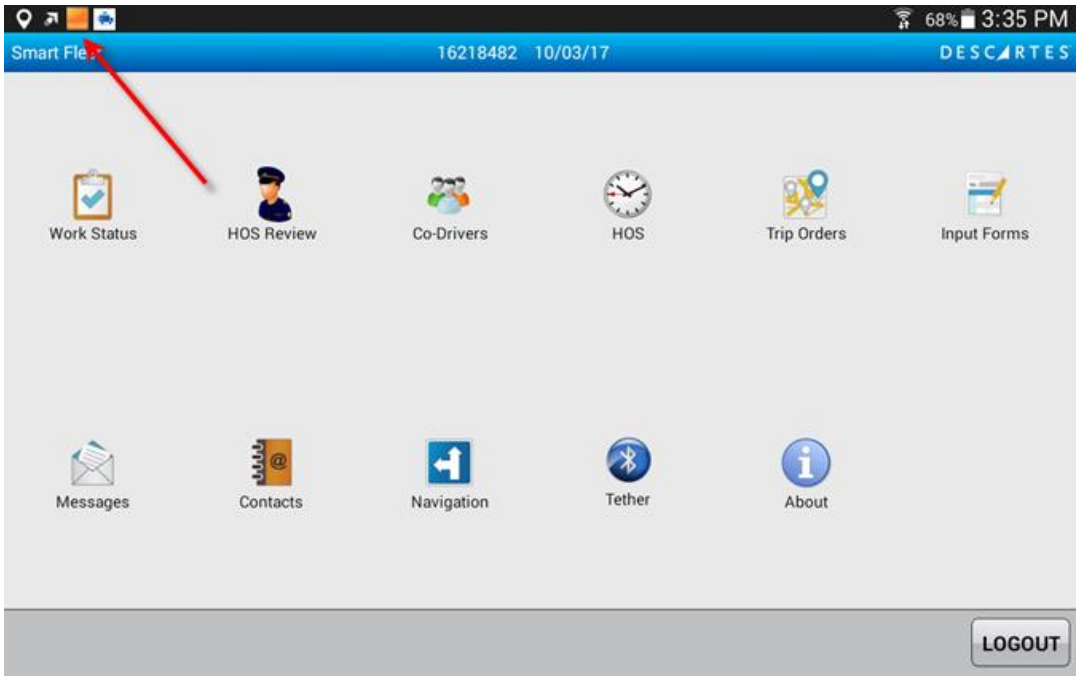
ELD Diagnostic

Descartes SmartFleet continuously monitors data using a set of parameters defined by the FMCSA and alerts users of ELD Diagnostic events as they occur. An orange square icon is displayed in the notifications bar of the mobile device to indicate an ELD Diagnostic Event.



Swipe down from the notifications bar to view additional information regarding the Diagnostic Event.

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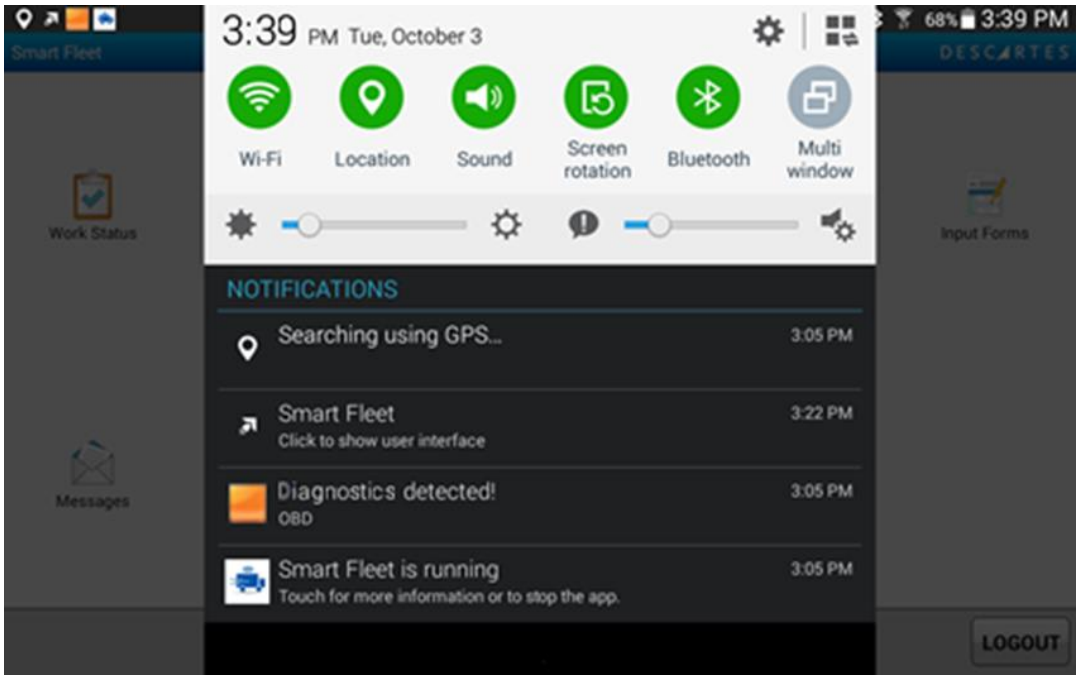

Your back-office will also be alerted of this Diagnostic Event and will contact you to help resolve the issue.

ELD Malfunction

Descartes SmartFleet monitoring may detect an ELD malfunction. Users are informed when an ELD malfunction occurs. A red square icon is displayed in the notifications bar of the mobile device to indicate an ELD malfunction.

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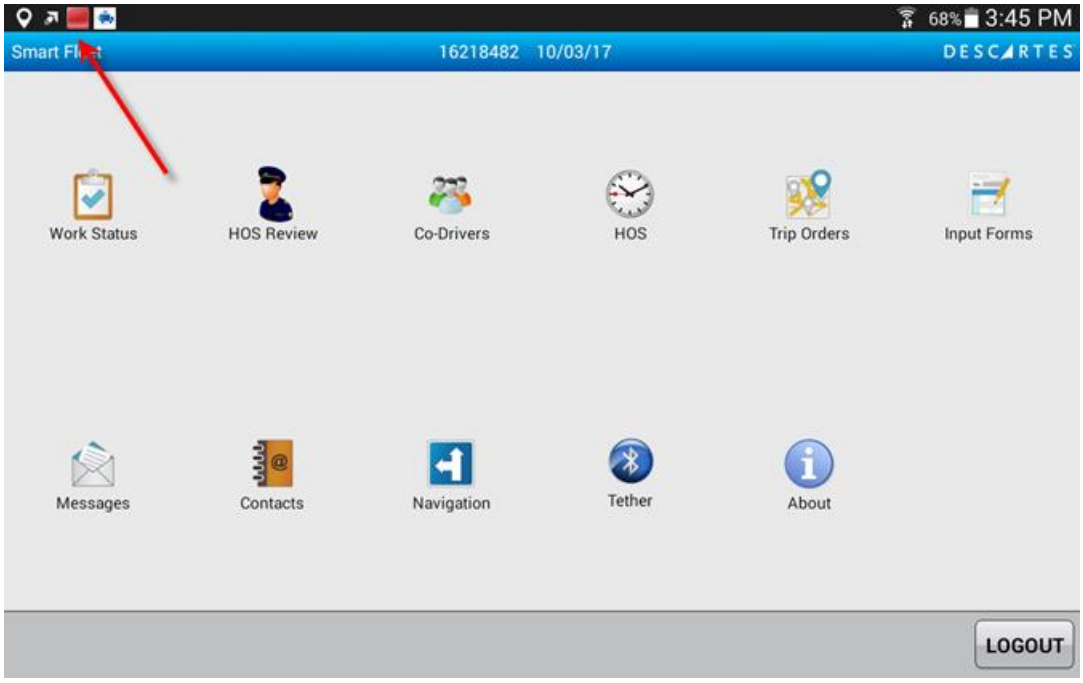
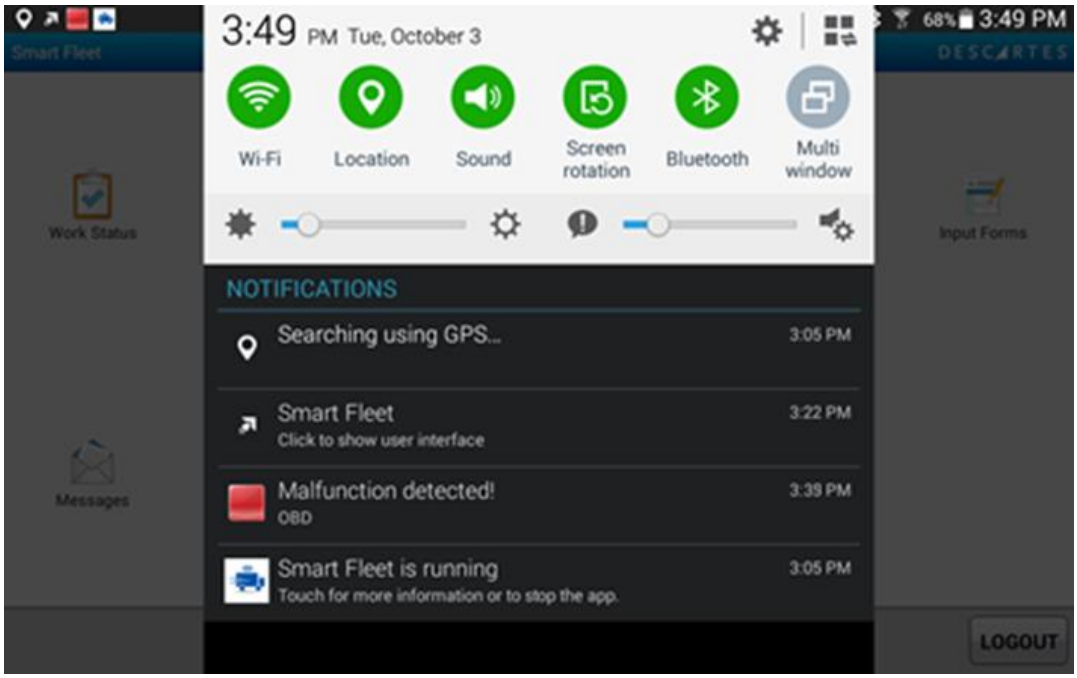


Swipe down from the notifications bar to view additional information regarding the ELD malfunction.



Your back-office will also be alerted of this Malfunction event and will contact you to help resolve the issue.

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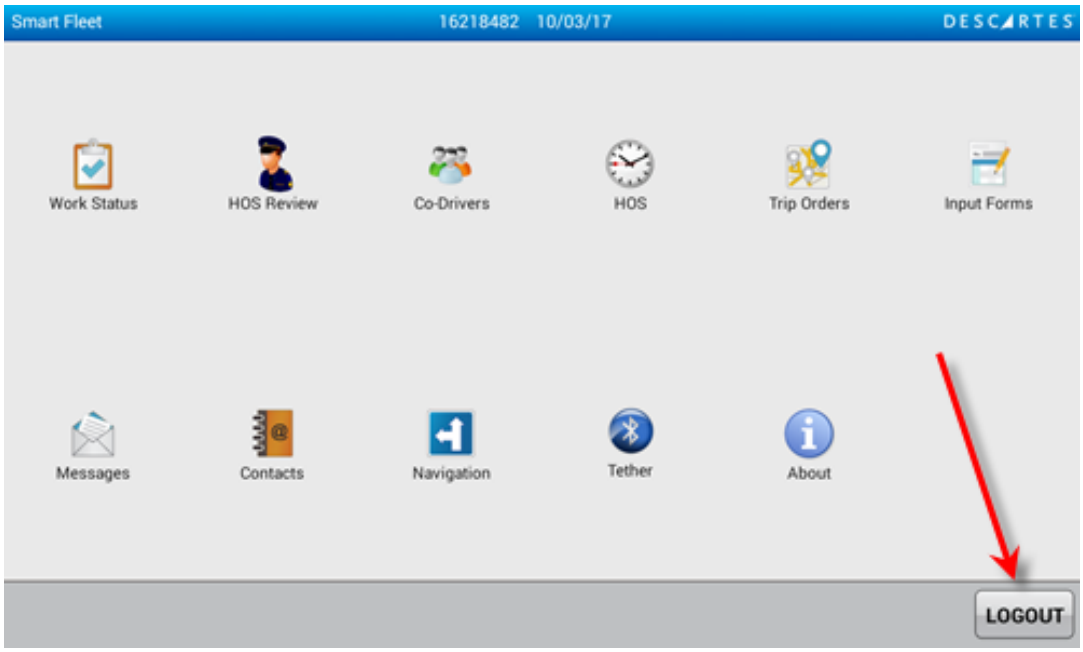
Log-Out

At the end of your Duty Period you must log out of Descartes SmartFleet.

To log out:

1 Tap the **Logout** button from the main Descartes SmartFleet menu.



2 HOS Logs should be certified before you log out. If you attempt to log out with uncertified logs, the system will prompt you to certify your logs. This process is described in the *Reviewing and Certifying Proposed HOS Logs* section of this document.

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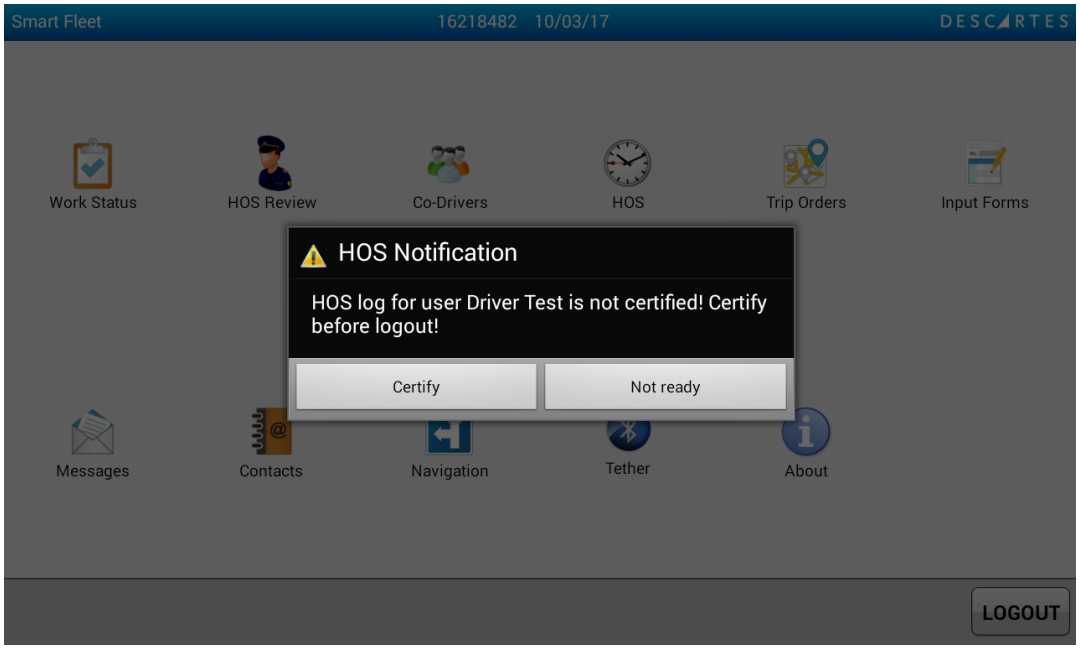
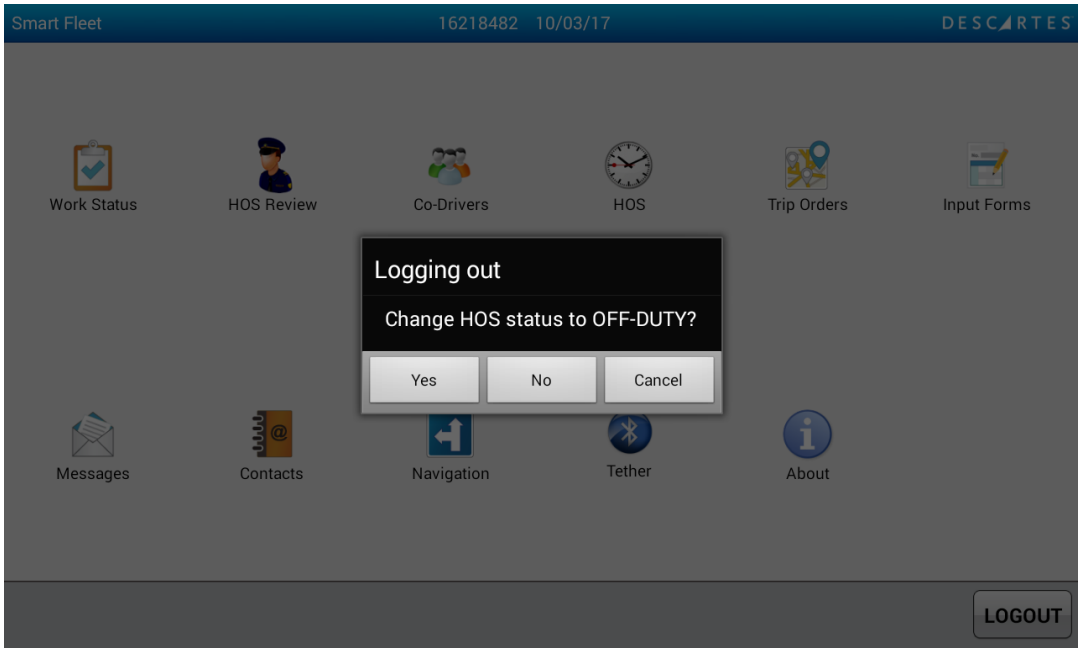


3 Once all logs have been certified, the Logout process continues and the system will prompt you to confirm your Duty Status.



If you are going off duty then you should indicate "Off Duty" status.

4 If co-drivers are logged in, a notification will appear and the co-driver is guided through the log certification and log-out process.

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