

DAVIS 

DriveRight®

Fleet Management Software

Getting Started Guide



DriveRights



Drivers



Vehicles

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DriveRight Fleet Management Software Getting Started Guide

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Introduction

The DriveRight Fleet Management Software (FMS) package allows you to store, view and manipulate DriveRight data on your PC. More specifically, FMS provides tools for sorting, tracking, analyzing and printing data, and viewing and printing reports for a number of individual DriveRight consoles.

This guide is intended to get you up and running with DriveRight FMS in the shortest time possible.

DriveRight FMS Features

- Supports the following DriveRight consoles: DriveRight 600, Trip 500AL, Trip 130AL, and Trip Computer.
- Supports the optional Palm Download Kit, which allows the DriveRight console to be downloaded without being disconnected from the vehicle.

- Automatic backup option allows the user to define the number of months of data kept in the active database.
- A new location field in the database facilitates “rolling up” data, making it possible to manage data from many locations in one database.
- FTP support simplifies uploading data to higher levels in the organization while preserving location information.
- Sophisticated reporting on driver safety and vehicle usage.
- Works with a variety of popular SQL relational database software products: MS Access, My SQL, MSDE, MS SQL Server, and Oracle.
- Installation of MS Access or MSDE is integrated into DriveRight FMS. No extra software or licenses required.
- Password security for data access and program functions.
- Exports GPS data to Microsoft MapPoint software.
- New Wizard for adding DriveRight consoles to the database.
- New context sensitive help.

Package Contents

Before installing the software on your PC, make sure your package includes the following items:

- DriveRight download cable
A black interface cable to connect the DriveRight to your PC. This may be a molded one-piece cable or a three-piece cable consisting of a black box with two cables attached to it.
- DB25 connector and DB9 connector
A 25-pin and a 9-pin connector with modular “telephone” plugs to connect the serial port cable directly to a serial port in your PC.
- DriveRight FMS software CD

System Requirements

DriveRight FMS requires the following:

- Windows PC running Windows 98 SE, ME, NT 4.0, 2000 or XP
- 32 MB of Memory (64 MB recommended)
- VGA/SVGA Monitor (800 x 600 or higher recommended)
- MS Excel required to view reports in Excel
- MS Excel and MS Outlook required to email reports

- MS MapPoint required to map GPS data

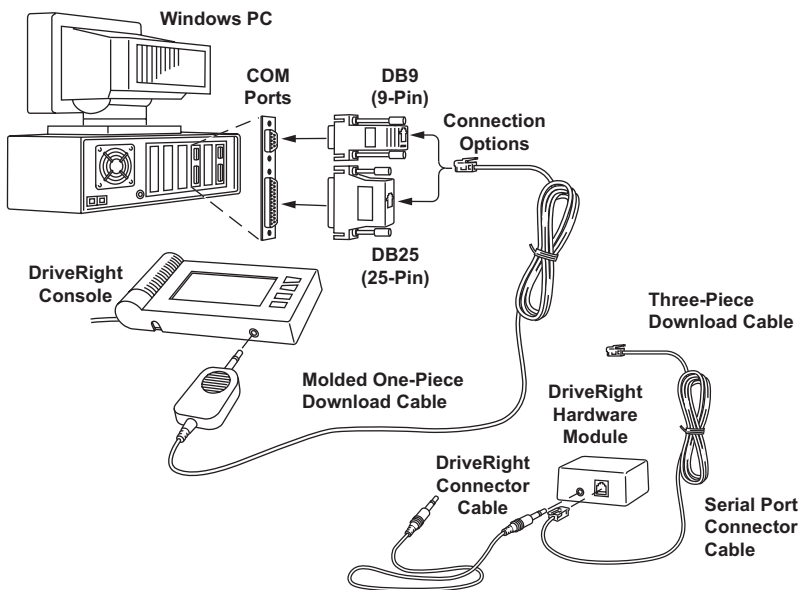
Additional DriveRight FMS Documentation

For more comprehensive information about DriveRight FMS, please refer to the DriveRight FMS Help and to the “DriveRight FMS User’s Manual” provided in the *fms_users_manual.pdf* file on the CD.

Please be sure to refer to the “DriveRight Fleet Management Software Database Selection Guide” for information on how to select and install the appropriate database for DriveRight FMS application.

Connecting the DriveRight to Your PC

To communicate with the DriveRight, connect the DriveRight to a serial port on your PC using the hardware and cable as shown below.



You can connect either the DB9 or DB25 connector to any free serial port. The hardware module may remain connected to the PC permanently. To download data from the DriveRight, connect the free end of the download cable to the DriveRight console at the time of the download.

Before You Install the Software

Before you run DriveRight FMS for the first time, you must first decide which database to use with the software. There are also software concepts you should become familiar with, and some initial planning considerations you should think about.

Database Selection Guidelines

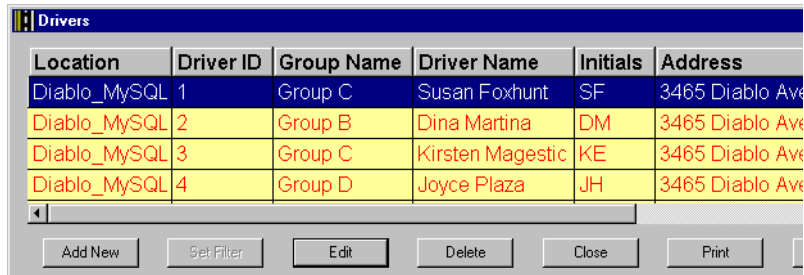
Here are some basic considerations for selecting your database.

NOTE: Please refer to the “DriveRight Fleet Management Software Database Selection Guide” for information on selecting and installing a database for use with DriveRight FMS.

- MS Access and MSDE are included with DriveRight FMS and require no additional purchase or setup to use. Access and MSDE are recommended for single-user installations with a fleet of no more than five vehicles.
- Either MySQL, MS SQL Server, or Oracle should be used for installations with multiple users, fleets larger than five vehicles, or for installations with multiple vehicles logging GPS data.
- To use MySQL, MS SQL Server, or Oracle, you must purchase the software and install it before running DriveRight FMS for the first time.

Key Concepts: DriveRights, Vehicles & Drivers

Your database is a collection of related tables (relational database) that contain information about your fleet (drivers, vehicles, DriveRights, addresses, etc.). For example, information about a driver in your fleet will be stored in it's own row in the Drivers Table. Each column (or field) in a row stores an attribute about a given driver.



Location	Driver ID	Group Name	Driver Name	Initials	Address
Diablo_MySQL	1	Group C	Susan Foxhunt	SF	3465 Diablo Ave
Diablo_MySQL	2	Group B	Dina Martina	DM	3465 Diablo Ave
Diablo_MySQL	3	Group C	Kirsten Magestic	KE	3465 Diablo Ave
Diablo_MySQL	4	Group D	Joyce Plaza	JH	3465 Diablo Ave

Buttons: Add New, Set Filter, Edit, Delete, Close, Print

Drivers Table View

Depending on your application, some tables in the database may be more important than others; but the following tables are of key importance: the Company Locations table, the DriveRights Table, the Drivers Table, the Vehicles Table, and the Trips Table.

- Every record in the database includes the company location. You can only view records together that have the same location.
- The DriveRights Table contains settings and calibration information about each DriveRight.
- The Vehicles Table and Drivers Table contain information related to your vehicles and drivers respectively.
- Driving information is organized in the DriveRight by trip, and is stored in the Trips Table.

Each table can be viewed by choosing the table you are interested in from the Database Menu.

Planning for Initial Software Use

The software allows for several layers of classification, and for different degrees of detail in accounting for driver and vehicle information. We recommend thinking about the following items so that you can tailor DriveRight FMS to your needs.

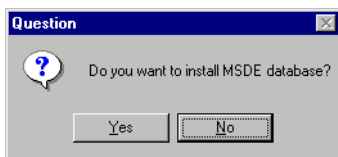
- **Define Fleets (Optional)**
If, at the same location you have separate groups of vehicles you want to track, you can assign these groups of vehicles to different fleets. Fleets can be created when you first set up your database or can be added later at any time.
- **Define Driver Groups (Optional)**
Within a certain location, are there separate groups of drivers you want to track? You can assign drivers to groups if you desire. Driver Groups can be set up when you are first creating your database or can be added later at any time.
- **Define Trip Addresses (Optional)**
You can create a list trip addresses for frequently visited clients, delivery points, or other routine destinations.

- **Password Protection (Optional)**
Do you want to protect all or parts of the data from unauthorized viewing and alteration? DriveRight FMS's password protection allows you to define each individual user's level of access to the data. If no users are defined then all users will have complete access to all software functions and to the data.

Installing the Software

Use this procedures to install DriveRight FMS.

1. **Insert the CD. If the install program does not appear, run SETUP.EXE from the CD.**
2. **If you are using the MSDE database, you must click yes when prompted during the installation.**



It adds about 10 minutes to the installation of you install MSDE on your computer.

First Time Running the Software

To start the program, double click the shortcut icon on the desktop or select DriveRight Software from the Start menu.

NOTE: *All software features (including some not covered here) are covered in the DriveRight FMS Help and in the DriveRight FMS User's Guide provided in the Adobe Acrobat file "driveright_fms.pdf".*

NOTE: *This manual uses the notation "Select **File>Import>Fleets...**" for menu commands. The first part of the notation ("File") represents the menu name, the second part ("Import") the sub-menu name (where applicable), and the final part ("Fleets") the command name.*

Initial Program Configuration

The first time you run DriveRight FMS, you will be required to perform the following steps to register and configure the software.

1. **Enter your eight-digit registration ID code.**
A dialog box will prompt you for your 8-digit code. You can find this code on the registration card accompanying the software and on the cover of this manual.
2. **Refer to the Database Selection Guide for additional program configuration instructions.**

Software Setup

After you have finished the initial program configuration, you will want to check the program preferences and enter the default DriveRight console settings, and test the DriveRight console communications.

NOTE: *Please refer to the DriveRight FMS Help for more information*

Use the following steps to set DriveRight FMS preferences:

1. **Set Unit Preferences**

Select **Setup>Preferences>Units...**

The dialog box that appears contains the following options:

Unit Mode

Specify the distance and speed units you want FMS to use (i.e. English or Metric).

Date Mode

Specify the date format you want FMS to use, including separators and leading zeros. Every date you enter in FMS will need to follow the format you choose.

Time Mode

Specify the time format used in the software (e.g., AM-PM or 24 hour clock).

2. **Set Automation Options**

Use the Automation Options command to configure your backup prompt and to set the number of months of records to keep in the active database.

Select **Setup>Preferences>Automation Options...**

Prompt for backing up database once every -- months

You can configure the software to prompt for a backup every one to six months.

Keep -- months of records active in database after every backup

When you backup your database, you can determine the number of months of data to be retained in the active database.

NOTE: *Refer to the Active Database Size Recommendations section in the DriveRight FMS Database Selection Guide or to the same section in the Quick Reference section of Help for automation option recommendations.*

3. Set Download Options

Select **Setup>Preferences>Download Options...**

The dialog box that appears contains the following options:

Synchronize time and date after every download

This option resets the DriveRight to the system time and date after each download. If you select this option, check the system time and date regularly to ensure accuracy.

NOTE: *If you choose this option, all DriveRight consoles included remote units downloaded through host mode will be reset to the computer's time and date, even if the remote DriveRight is in a different time zone.*

Use DriveRight ID Code as Trip Address ID or Driver ID (DriveRight 500 & 600 only)

With the DriveRight 500 & 600 you may specify a Driver ID using the code on the DriveRight.

If only one driver uses a vehicle, the code may be used as a trip address ID. To specify an ID for each trip address, select **Database>Trip Addresses....** Then at the beginning of each trip, specify the trip address ID in the DriveRight console.

When downloading the DriveRight, DriveRight FMS interprets each ID as the destination of a trip.

Default DriveRight Settings Wizard

You can edit the default DriveRight settings using the Setup Wizard: Select **Setup>Default DriveRight Settings>Setup Wizard**.

NOTE: *See the DriveRight FMS Help for more information on using the Default DriveRight Settings Wizard.*

You can edit defaults for the following DriveRight settings:

Unit Settings

Select the date, time and unit modes.

Safety Settings

Enter the speed, acceleration and deceleration limits.

Timer Settings

Enter the trip stop time and driver log out time.

Alarm Settings

Select the alarm mode. Warn if not logged in is an option.

Security Settings

Enter the security code (PIN code). Tamper indicator is an option.

Select Serial Port - Test DriveRight Communications

Use the Serial Port command in the Setup Menu to select the serial port used to connect to a DriveRight console.

- The software supports serial ports COM 1 through COM 8.
- Use the Auto Detect button in the Serial Port dialog box to automatically detect which serial port a DriveRight console is connected to and to verify communications with the DriveRight console.

NOTE: *When using the Auto Detect feature, be sure the DriveRight console is connected to the computer and is active, with data showing on the LCD screen.*

NOTE: *You may have problems using your serial port if you are running another application, such as the Palm Hotsync Manager, that uses the serial port. If you do have problems, be sure to close any applications using the serial port.*

Building Your Database

To build up your DriveRight database, first add the drivers, second add the vehicles, and third add the DriveRight consoles.

NOTE: *If you are importing data from an earlier version of DriveRight software, please see "Importing Data from DriveRight 2.x" on page 11.*

1. Add Drivers

Add drivers to your database using the Add New command in the Drivers browse window: Select **Database>Drivers>Add New**.

2. Add Vehicles

Add vehicles to your database using the Add New command in the Vehicles browse window: Select **Database>Vehicles>Add New**. When you add a vehicle, you will need to select a default driver for it from the list of drivers. If you do not have a default driver to assign to this vehicle, select UNALLOCATED DRIVER.

3. Add New DriveRights

Add DriveRight consoles to your database using the Add DriveRight Wizard in the DriveRight Menu: Select **DriveRight>Add New DriveRight**. When you add a DriveRight, you will need to select the default vehicle for it from the list of vehicles. If you do not have a default vehicle to assign to this DriveRight, select UNALLOCATED VEHICLE.

NOTE: *If you are using GPS with your DriveRight 600, you need to activate the GPS module using the GPS Settings command: Select **DriveRight> DriveRight Settings>GPS Setup**.*

Downloading Data

Once the data connection is established and the software is configured, you are ready to collect data and transfer it to the various database files.

To download data:

- The DriveRight console must be added to the database, using the Add New DriveRight function, before you can download it into the database..
- The DriveRight must be connected to the computer and be active (LCD screen display on) to download data. Press the MODE key on the DriveRight if the LCD is blank.
- Use the Download command in the DriveRight menu to download data, or use the Download DriveRight icon in the toolbar:

*Download
DriveRight
Icon*



NOTE: *The optional DriveRight Palm Download Kit (# 8181) allows you to transfer data from a DriveRight console to a Palm PDA, then download the data from the Palm into DriveRight FMS.*

Calibrating DriveRight Consoles

A DriveRight console must be properly calibrated to accurately record trip information. The DriveRight User's Guide includes information on calibrating a DriveRight console in the vehicle. You can also calibrate a DriveRight console using the FMS if you have some basic information about the vehicle.

Additional Software Topics

Once you begin collecting data, you can use DriveRight FMS to report, filter, import and record the DriveRight data. The following section provides a brief overview of these and other functions. More information on all of these, and other, features is available in the online help file and in the printable manual and "readme" files found in the DOC folder of the DriveRight Software folder.

Backup and Restore

Use the Backup command to create safety backups of your DriveRight FMS data. The automation options you set in the Preferences menu will allow you to limit the amount of data that remains in your active database. We recommend monthly backups. We also recommend keeping a limited number of months data in the active database.

Reporting

The reporting tools are perhaps the most valuable aspect of DriveRight FMS for vehicle managers and other vehicle administrators. The Reports Menu offers tools for determining use and safety information.

Importing Data from DriveRight 2.x

A separate conversion utility, OldToNew, has been included with the DriveRight FMS software to allow the conversion of existing DriveRight 2.x database files for use with DriveRight FMS.

- This conversion process can take a fairly long time, depending on the size of your 2.x database.
- Only data in the active database of the 2.x software will be converted.
- This conversion utility can only be used with databases created by DriveRight 2.04, 2.05, 2.06 or 2.6. If you are using an earlier version of the DriveRight software you must first upgrade to one of the supported versions.

Use the following procedure to convert your existing DriveRight database for use with DriveRight FMS:

1. **Install and run DriveRight FMS before you convert your data to the new format.**
2. **Verify the current location in DriveRight FMS using the Current Location command in the Setup Menu.**
This location information will be associated with all the 2.x data when converted into the new database format.
3. **To import data to a new location, select the Company Locations command in the Database Menu in DriveRight FMS, then click the Add New button in the Company Locations browse window.**
4. **Go to Startup>Programs>DriveRight and run OldToNew.**
5. **To import data, select the location from the drop down list.**
6. **Click the Browse button to select the old Borland tables directory (By default it is C:\Program Files\DriveRight Software\tables).**
7. **Click the Convert button to start the conversion.**
Once the data is converted you will see a success message.

NOTE: *The conversion process can take a long time depending on the size of your 2.x database. You can interrupt the conversion at any time by clicking the stop button, but this is not recommended.*
8. **All the 2.x data has been converted into the new database format for DriveRight FMS.**
9. **Go to DriveRight FMS and view various tables using the Database Menu commands to make sure the data has been converted properly.**

Contacting Davis Technical Support

If you have questions about the software, or encounter problems installing or using the software, please contact Davis Technical Support. Most questions can be answered while you're on the phone.

NOTE: *Sorry, we are unable to accept collect calls.*

(510) 732-7814 – Monday through Friday, 7:00 a.m. to 5:30 p.m. Pacific Time.

(510) 670-0589 – Fax to Technical Support.

support@davisnet.com – E-mail to Technical Support.

info@davisnet.com – E-mail to Davis Instruments.

www.davisnet.com – Product documentation is available on the DriveRight Support section of our website. Watch for FAQs and other updates.



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