

J. J. KELLER® SMARTASSIGN™ TECHNOLOGY



Table of Contents

- SmartAssign™ Unassigned ELD Log Events 3
 - What is SmartAssign™ Technology?4
 - Setup5
 - Unassigned ELD Log Events and Pending Log Edits Alerts13

SmartAssign™ Unassigned ELD Log Events

What is SmartAssign™ Technology?

For Encompass users that utilize Mandate functionality, there is a new feature: **SmartAssign™ Technology for Unassigned ELD Events**. SmartAssign™ Technology will reduce time spent managing unassigned ELD log events using our new algorithm which makes driver recommendations for these unassigned events. **This does NOT mean Encompass will automatically place the drive time on the driver's log. Instead, it will process the event just like an Encompass user would and send it to Keller Mobile for the driver to either accept or reject.**

Encompass determines if an unassigned ELD event should automatically be processed based on different confidence levels determined by Keller Mobile. Confidence levels are based on a number of different variables including:

- When the vehicle was last moved
- Who last moved the vehicle

...and many others

The level of confidence in which Encompass will auto-process the event is determined by the Encompass administrator via **Setup > Mobile Company Settings**.

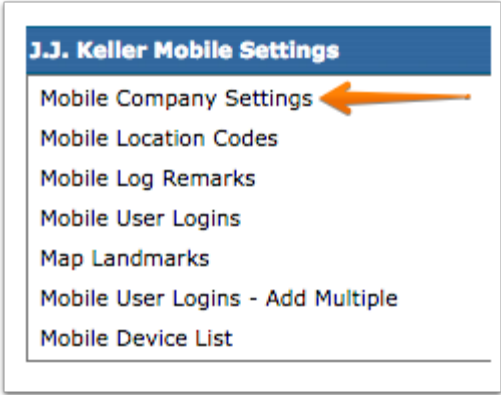
i The addition of this feature will not change how drivers accept or reject ELD log events assigned to them. It will, however, recommend the edit to the driver much more quickly, resulting in them having an up-to-date, accurate log, without requiring an Encompass user to assign the event.

i SmartAssign™ Technology is optimal for fleets with drivers that are dedicated to trucks. For fleets with slip-seated drivers, the confidence level should be set to a higher number so the event isn't assigned to the wrong driver.

Setup

Enable & Set Confidence Levels

Go to Setup > Mobile Company Settings in the J.J. Keller Mobile Settings box.




Scroll down to the second section titled Unidentified Driving Settings.

Unidentified Driving Settings

Enable Auto-Assignment

☒

Default Originator

Demo User (DemoUser@jjkeller.com) 

Confidence Level Percent

90

Auto-Assignment of Yard Moves

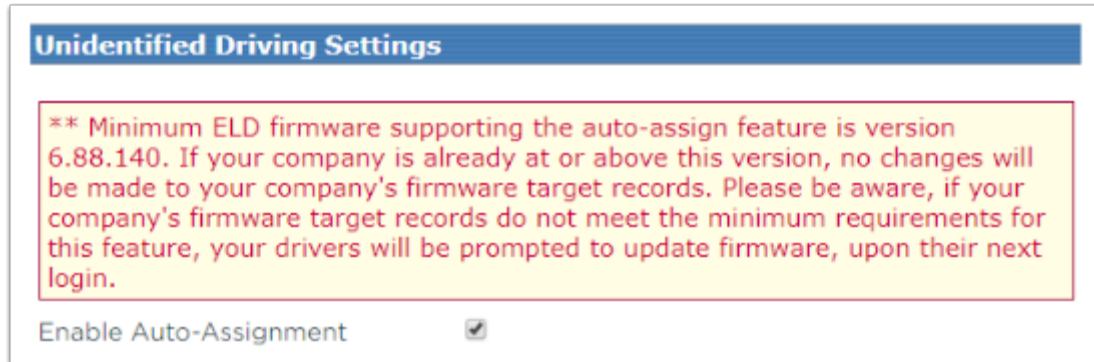
Compare Unassigned Events to Geo-fenced Yards to Automatically Assign as Yard Move

☒

Auto-Assignment is limited to the last 7 days when reading history.

Check the box next to **Enable Auto-Assignment** to turn on the SmartAssign™ feature.

- A warning message will be displayed reminding users that a firmware update is required for the SmartAssign™ to function properly. After the feature is enabled, the next time a driver logs in to Keller Mobile with the most current version of the application and connects to the ELD, they will automatically be placed in a firmware update. The firmware update can take up to 10 minutes to complete. Making sure the driver has adequate time to complete the firmware update is essential as the truck CANNOT move during the firmware update.



Select the **Default Originator**

- When any edit (automatic or manual) is made to a mandate log in Encompass, the Encompass user that made the edit is associated with the change. This drop down will provide a list of Encompass Users that have either the Administrator or the Keller Mobile Admin role, which will be automatically assigned to the unidentified event generated by the SmartAssign™ Technology process.



Set the Confidence Level

- This means that any unassigned ELD event that comes into Encompass and with a calculated confidence level equal to or above the confidence level set here will be automatically sent to the suggested driver.

Confidence Level Percent	90
--------------------------	----

The confidence level is calculated within Keller Mobile when the historical records are read from the ELD. At this point, the driver can choose to claim the unassigned event or ignore it. This process **ONLY** applies if they choose to not claim or ignore the unclaimed driving event. Keller Mobile does not determine *if*, by this confidence level, the unassigned ELD event should be automatically processed; it only *assigns* the confidence level. Keller Mobile will calculate the confidence level on a percentage scale from 0 to 100% with the potential levels of:

- 100%
- 90%
- 80%
- 70%
- 60%
- 50%
- 30%
- 10%
- 5%
- 0%

Frequently, the SmartAssign™ process will run in Encompass to process any unassigned ELD events that have a confidence level at or above the level determined by the Administrator.

Note: This is not automatically placing the driving event on the driver's log, it is processing the event to propose an edit to the log for the driver to either accept or reject.



FAQ: What should the confidence level be set to?

Answer: This answer will vary. It is suggested, however, to start with a higher number, and then adjust to lower numbers as the users become familiar with the SmartAssign™ Technology.

FAQ: What if the confidence level is set to 0% in Setup?

Answer: This means any unassigned ELD log event with a confidence level greater than 0 that comes into Encompass will be automatically processed via SmartAssign™.

Unassigned ELD log events with a confidence level of 0 will not be automatically processed because there is no suggested driver.

Enable the Auto-Assignment of Yard Move

- Note: This feature is only available if using the Premium edition of Encompass with Mandate enabled.

Auto-Assignment of Yard Moves

Compare Unassigned Events to Geo-fenced Yards to Automatically Assign as Yard Move



Check the box to Auto-Assign Yard Moves if the system should automatically process any unassigned ELD events that are 1.0 mile or less AND within a defined Geo-Fence area (See next section on how to setup a Geo-Fence).

This process will only go back **7 days**. This means that any unassigned ELD events that Keller Mobile reads past 7 days ago (including the current day) will NOT be assigned a confidence level.

Auto-Assignment is limited to the last 7 days when reading history.

For Yard Moves - Geo-Fence

As mentioned before, Yard Moves can also be included in the SmartAssign™ process. The Unassigned ELD Log Event will automatically process as a **Yard Move** if:

- The confidence level is equal to or greater than the confidence level determined in **Setup > Mobile Company Settings**.
- The check box for **Auto-Assign Yard Moves** is checked.
- The Unassigned ELD Log Event is **1 mile** or less.
- The Unassigned ELD Log Event occurs entirely within a Geo-Fence designated as a **Yard**.
 - **Note: This feature is only available for Encompass Premium users with Mandate enabled.**

Setting up the Geo-Fence is a two step process:

1. Setup a **Landmark**.
2. Setup a **Geo-Fence** around the Landmark.

To setup the Landmark:

- Go to **Setup > Map Landmarks** (in the J. J. Keller Mobile Settings box towards the bottom).
- Enter the **Name** of the landmark.
- Select how the landmark should be found, either by **address** or **GPS coordinates**.
- If there is an icon or logo that should be used to indicate the landmark, click **Browse...** to upload an image from your machine.
 - **Note:** Since this is pinpointing one location, this image should be relatively small.
- Check the box for **Yard?** to indicate the area around this landmark is a yard.
- Enter the **address** or the **GPS coordinates** dependent on what was selected above.
- Click **Save & Add Geo-fence**

J.J. Keller Mobile Settings

- Mobile Company Settings
- Mobile Location Codes
- Mobile Log Remarks
- Mobile User Logins
- Map Landmarks
- Mobile User Login
- Mobile Device List

Maintain Landmarks

Add Landmark | Import Landmarks | Get Tags

Add Landmark

Save | Cancel | Save & Add New | Save & Add Geo-fence

Name

Landmark Creation ☒ Address Entry ☐ GPS Coordinates Entry

Icon Browse... No file selected.

Show in List? ☒ ?

Yard? ☐

ENTER ADDRESS

Address

City

State

Zip Code

Save | Cancel | Save & Add New | Save & Add Geo-fence

Add Landmark

Shaded Fields are Required

Save | Cancel | Save & Add New | Save & Add Geo-fence

Name

Landmark Creation ☐ Address Entry ☒ GPS Coordinates Entry

Icon Browse... No file selected.

Show in List? ☒ ?

Yard? ☐

ENTER GPS COORDINATES

Latitude (Example: 33.809765)

Longitude (Example: -85.751724)

Save | Cancel | Save & Add New | Save & Add Geo-fence

To setup the Geo-Fence:

- Either select circular or polygonal Geo-fence
 - If circular is selected, enter in the appropriate radius.
 - If polygonal is selected, change the map style to **Satellite** directly below the map and then zoom in so the user can see the yard. Follow the instruction on this page to click around the yard and create the polygonal Geo-fence.
- Once the Geo-Fence is created, click **Save** to create the Geo-Fence.

Add Geo-fence

Landmark information was successfully stored.


Save **Cancel**

☐ Create circular geo-fence with a radius of miles

☒ Draw polygonal geo-fence

[Clear Geo-fence](#)

When drawing a polygonal geo-fence, click all the points of the perimeter on the map. When finished, click on the first point again to close and confirm the polygon's shape. To delete and start over, simply click on your geo-fence and press the Delete key on your keyboard.



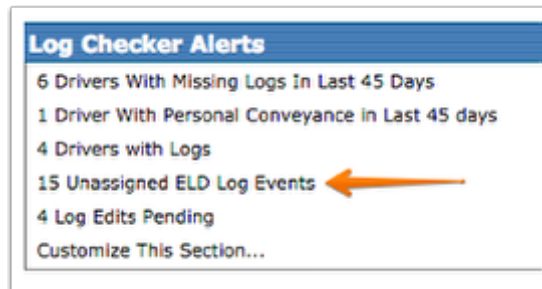
Change Map Style **Satellite**

Save **Cancel**

Unassigned ELD Log Events and Pending Log Edits Alerts

Unassigned ELD Log Events Alert

When the driver logs out and submits their logs, the unassigned event will come into Encompass and show in the Unassigned ELD Log Event alert.




When this feature is enabled, two new columns will appear in the Unassigned ELD Log Events alert:


- Suggested Driver
- Confidence Level

Log Checker													
Add New Employee													
Select View:	Unassigned ELD Log Events			Go	Customize...	Print	Process Selected Events	Process as Personal Time	Process as Yard Move	Clear Alert			
Unit	Converted Event Start	Converted Event End	Converted Distance	Suggested Driver	Confidence Level	Time Zone	Event Type	Company Level	Uploaded By Employee Name	UTC Start Time	UTC Stop Time	Record Originator	
<input type="checkbox"/> bill3	9/6/2018 07:46 AM	9/6/2018 08:29 AM	11.0	Lundquist, Bill	80	Central	Driving	BL Setup 1	Lundquist, Bill	9/6/2018 12:46:53 PM	9/6/2018 1:29:00 PM	Unidentified Driver	
<input checked="" type="checkbox"/> Truck 1	9/12/2018 02:25 PM	9/12/2018 02:30 PM	7.0	Lundquist, Bill	70	Central	Driving	BL Setup 1	Lundquist, Bill	9/12/2018 7:25:06 PM	9/12/2018 7:30:10 PM	Unidentified Driver	
<input type="checkbox"/> bill3	8/31/2018 04:12 PM	8/31/2018 04:43 PM	12.0	Lundquist, Bill	50	Central	Driving	BL Setup 1	Lundquist, Bill	8/31/2018 9:12:21 PM	8/31/2018 9:43:07 PM	Unidentified Driver	
<input type="checkbox"/> bill3	9/6/2018 08:49 AM	9/6/2018 09:03 AM	2.0	Lundquist, Bill	50	Central	Driving	BL Setup 1	Lundquist, Bill	9/6/2018 1:49:27 PM	9/6/2018 2:03:32 PM	Unidentified Driver	
<input type="checkbox"/> bill3	8/31/2018 02:43 PM	8/31/2018 02:58 PM	11.0		0	Central	Driving	BL Setup 1	Lundquist, Bill	8/31/2018 7:43:46 PM	8/31/2018 7:58:57 PM	Unidentified Driver	
<input type="checkbox"/> bill3	9/3/2018 04:50 PM	9/3/2018 05:38 PM	30.0		0	Central	Driving	BL Setup 1	Lundquist, Bill	9/3/2018 9:50:40 PM	9/3/2018 10:38:36 PM	Unidentified Driver	
<input type="checkbox"/> bill3	9/3/2018 08:55 PM	9/3/2018 09:41 PM	34.0		0	Central	Driving	BL Setup 1	Lundquist, Bill	9/4/2018 1:55:45 AM	9/4/2018 2:41:44 AM	Unidentified Driver	
<input type="checkbox"/> bill3	9/4/2018 07:18 AM	9/4/2018 07:44 AM	12.0		0	Central	Driving	BL Setup 1	Lundquist, Bill	9/4/2018 12:18:26 PM	9/4/2018 12:44:16 PM	Unidentified Driver	
<input type="checkbox"/> bill3	9/4/2018 04:55 PM	9/4/2018 05:12 PM	12.0		0	Central	Driving	BL Setup 1	Lundquist, Bill	9/4/2018 9:55:21 PM	9/4/2018 10:12:56 PM	Unidentified Driver	

Events that come into Encompass from Keller Mobile with a confidence level equal to or above the confidence level determined in Setup will be processed frequently. Because of this, there may be some instances in which an unassigned ELD log event that would be expected to automatically processed due to the confidence level will show in this list. This typically means that the SmartAssign™ process hasn't run since the event came in. Once the SmartAssign™ process runs, the event will be sent to the Suggested Driver for acceptance or rejection.

 **Note:** There may be unassigned ELD log events that show up in this list **without** a confidence level. This could happen for a few reasons:

1. The submitting driver is not on a recent version of Keller Mobile that supports this feature.
2. Per the messaging in **Setup**, any unidentified driving events older than 7 days will not be assigned a confidence level.

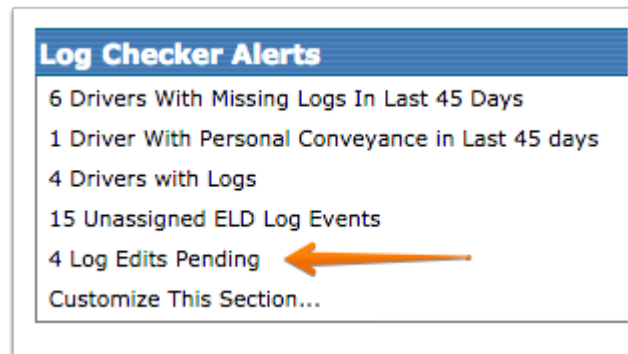
 **FAQ:** Why are there unassigned ELD log events with a calculated confidence level of 100% showing in the Unassigned ELD Log Events alert?

Answer: This could be happening for a few reasons:

1. While the SmartAssign™ process runs frequently, it is not continuously running. It may be that the process hasn't run since the event was submitted to Encompass by the Keller Mobile user.
2. If the event lingers even after the process has run, it may be that there is a conflict in trying to process the event. For instance, if there is already drive time on the log for the driver for the driving segment in question, it will not be able to process that event automatically. The event will need to be handled manually.

Pending Log Edits Alert

Once unassigned ELD log events are processed, they are sent back to the driver via Keller Mobile for them to accept or reject the proposed edit. When this happens, the events will show in the Log Edits Pending alert on the home page of Encompass until the driver acknowledges the event.



Regardless of whether an unassigned ELD log event is processed manually or automatically with the SmartAssign™ Technology, the event will show in the Pending Log Edits alert. There will be an additional column seen here called **Confidence Level**. This value will be brought over with the Unassigned ELD Log Event if it is processed via SmartAssign™. Once the driver accepts or rejects the proposed log edit, it will be removed from this alert.

Log Checker								
Add New Employee								
Select View:	Log Edits Pending	Go	Customize...	Print	Clear All	Clear Alert		
Employee Name ▲	Employee Code	Requested Edit	Company Level	Log Date	Edit Status	Confidence Level	View Revision History	Clear
Lundquist, Bill	bill	admin userBL	BL Setup 1	9/4/2018	Pending	90	View Revision History	Clear
Lundquist, Bill	bill	admin userBL	BL Setup 1	9/4/2018	Pending	90	View Revision History	Clear
Lundquist, Bill	bill		BL Setup 1	8/31/2018	Pending	100	View Revision History	Clear
Lundquist, Bill	bill		BL Setup 1	8/31/2018	Pending	100	View Revision History	Clear

FAQ: How are ELD log events processed by SmartAssign™ distinguished from manually processed ELD log events?

Answer: They are not. These events and log edits would show on the log revision history just like any other log edit made.

i If there are any additional questions that this guide does not address, please contact Client Services at 1-800-327-1342.