



Driver Management

Quick Guide

Version 24.x
Last Modified 24.0 | March 2024

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Website: Community.AssetWorks.com

The support website can be used to open issues, subscribe to user groups and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

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Overview & Setup

The Driver Management module in M5 is a licensed module that allows fleet organizations to track driver information related to things like **Driver License Management & Legal Compliance** (through driver and license record keeping) and **Driver Risk Management** (through event tracking and reporting) to help promote and ensure safety and efficiency within the organization.

To help ensure accuracy within the Driver Management module, careful planning and attention to detail are necessary when setting up the module within your M5 System for the first time.

The following is intended to guide you through the important frames and system settings within M5 that will have an impact on what data M5 tracks and how it tracks it within the Driver Management Module.

Frames

Driver Codes:

- Driver Status Codes
- Driver Types
- Driver Classes

Licenses:

- Driver License Issuing Authorities
- Driver License Types
- Driver License Classes

Driver Setup:

- Employee/Driver Main
- Employee Main
- Driver Main

Driver Event Management:

- Driver Event Classes
- Driver Event Types
- Driver Event Risk Management
- Driver Event Items
- Driver Event Entry
- Driver Event Status

Reporting:

- Driver Event Query
- Department Event Query
- Department Driver Scores Query
- Driver Event Calendar
- Driver Event Year Calendar

System Flags

5360 – Warning Days for Driver Events – The system will display an amber warning on Driver Events after this many days.

5436 – Require Driver Number on Employee Main? (Y/N) – This system flag will require the driver number on Employee Main if the driver flag is set to 'Y' for the employee in the **Position Information** section of Employee Main.

5445 – Number of notifications to be generated for Driver Event Notifications – Default will be blank. If blank, a qualifying Driver Event email Notification will always generate if the notification is enabled in the Notification Manager frame. This pertains to Notification options Driver Event Approaching Expiry and Driver Event Expired. A positive number value will represent the number of times the event notification will be sent per configured notification.

Driver Code Setup

Driver Status Codes

Driver Status codes must be set up before prior to creating Driver records. These are user-defined codes that identify the current status of a driver for reviewing and reporting purposes. Each code must be accompanied by a description. Driver Status codes are also mandatory on all driver records.

For example, A - Active, I - Inactive, S - Suspended, or L - Leave of Absence.

SAVE
UNDO
REFRESH
DELETE
FIND

Driver Status Codes

Driver Status Codes (Loaded 9 records)

Code	Description	Inactive	Disabled	Default
A	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
B	Banned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E	External Driver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I	Inactive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
L	Leave of Absence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
M	Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P	pete test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S	Suspended	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
T	test status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- The **Code** field has a limit of just one alphanumeric character.
- The **Description** field has a limit of 20 alphanumeric characters.
- **Inactive** – This flag, when selected, represents whether the status would render the driver usable or not (for example, New Drivers would be active and Disqualified drivers would be inactive). This is a reference value and does not result in any systematic restrictions.
- **Disabled** – This flag, when selected, disables the code from use on driver records and related frames.
- **Default** – This flag, when selected, designates a code as the default driver status for employee or driver records created by using an interface.
- Driver Status Codes can only be **deleted** if they have not yet been used or associated with other records throughout the M5 system.

Driver Types

Driver Types give you the next level of categorization for your Drivers. These Driver Types or categories are also user-defined. For example, LOCAL – Local Only or EMER – Emergency Services. These are set up on the Driver Types frame and are mandatory on all driver records.

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Driver Types

Driver Type Codes (Loaded 20 records)

Code	Description	Disabled	Default
A	A	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AG	Agency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ANEW	<input type="text" value="a new driver"/>	<input type="checkbox"/>	<input type="checkbox"/>
B	<input type="text" value="b"/>	<input type="checkbox"/>	<input type="checkbox"/>
C	c	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CD	Collection and Deliv	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DROP	Dropoff	<input checked="" type="checkbox"/>	<input type="checkbox"/>
EMP	Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>
LIC	Licence Photo Card	<input checked="" type="checkbox"/>	<input type="checkbox"/>
LOCAL	Local only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
OTR	Long Haul	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- The **Code** field has a limit of six alphanumeric characters.
- The **Description** field has a limit of 20 alphanumeric characters.
- **Disabled** – This flag, when selected, disables the code from use on driver records and related frames.
- **Default** – This flag, when selected, designates a code as the default driver type for employee or driver records created by using an interface.
- Driver Types can only be **deleted** if they have not yet been used or associated with other records throughout the M5 system.

Driver Class

Driver Class Codes are another set of user-defined codes used for identifying and classifying drivers. You can identify drivers by experience level, type of licensing, seniority, or other classification types.

The Driver Classes frame allows you to create and maintain a list of these codes to assist in driver identification, traceability, or meeting other regulatory requirements. These codes are optional and are not required on driver records.

SAVE UNDO REFRESH DELETE FIND

Driver Class

Driver Class Codes (Record 11 of 11)

Code	Description	Disabled
123456	Example	<input type="checkbox"/>
A	Example 1A	<input type="checkbox"/>
AAA	Example 3A	<input type="checkbox"/>
AAAA	Example 4A	<input type="checkbox"/>
AAAAA	Example 5A	<input type="checkbox"/>
AAAAAA	Example 6A	<input type="checkbox"/>
ADR	Example ADR	<input type="checkbox"/>
CCCCC	Example 5C	<input type="checkbox"/>
FULL	Full Licence	<input type="checkbox"/>
PROV	Provisional Licence	<input type="checkbox"/>

- The **Code** field has a limit of six alphanumeric characters.
- The **Description** field has a limit of 50 alphanumeric characters.
- **Disabled** – This flag, when selected, disables the code from use on driver records and related frames.
- Driver Classes can only be **deleted** if they have not yet been used or associated with other records throughout the M5 system.

Driver Status Codes

Driver Status Codes are user-defined codes that identify the current status of a driver for reviewing and reporting purposes. These codes are optional and are not required on driver records.

Driver Status Codes

Code	Description	Inactive	Disabled	Default
1	New Driver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Unlicensed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Unrenewable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
B	Banned	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C	Cancelled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E	External Driver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I	Inactive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
L	Licensed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
M	Test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- The **Code** is a one-character code.
- The **Description** allows for up to a 20-character description of the code.
- The **Inactive** flag checkbox indicates whether the status code represents an Active or Inactive status type. This allows for the creation of other status codes, such as S - Suspended, so that drivers can be tagged for specific review and actions while still being treated as active or inactive. To disable a code, select the Disabled flag checkbox.
- To set a default code to display on the driver's record, select the **Default** flag checkbox.

License Configuration

Driver License Issuing Authorities

When entering the Driving License details against a driver, you will need to specify which authority issued the driving license in the country your fleet operates in.

These are managed in the Driver License Issuing Authorities frame. Navigate here and input a unique code and a description.

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Driver License Issuing Authorities

License Issuing Authorities (Record 1 of 5)

Code	Description	Disabled
CNAUTH	Driver License Issuing Authorities	<input type="checkbox"/>
DSA	Driver Standards Agency	<input type="checkbox"/>
DVLA	Driver & Vehicle Licencing Agency	<input type="checkbox"/>
NONUK	Foreign Licence (non UK)	<input type="checkbox"/>
PA	Pennsylvania Department of Transportation	<input type="checkbox"/>
		<input type="checkbox"/>

- The **Code** field has a limit of six alphanumeric characters.
- The **Description** field has a limit of fifty alphanumeric characters.
- Select the **Disabled** checkbox to disable an existing code, then select SAVE.
- After you are finished, select the SAVE button at the top of the frame.

Driver License Types

Each Driver License Authority can issue multiple types of licenses (for example, Provisional, Full, Tacho, Heavy Goods). The Driver License Types frame is where you set up these variations.

The License Types are set up uniquely to each Authority.

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Driver License Types

Licence Issuing Authority

Issuing Authority: Description:

Driver Licence Types (Loaded 4 records)

Code	Description	Disabled	
CLASS A	<input type="text" value="Standard License"/>	<input type="checkbox"/>	
CLASS B	<input type="text" value="Motorcycle"/>	<input type="checkbox"/>	
CLASS C	<input type="text" value="Commercial License"/>	<input type="checkbox"/>	
TEST	<input type="text" value="Administrative"/>	<input type="checkbox"/>	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	

- Enter or select the **Issuing Authority** from the list of values. The **Description** automatically displays based on your selection.
- After entering the issuing authority, you can set up the **Drive License Types** for that authority.
- The **Code** field has a limit of ten alphanumeric characters.
- The **Description** field has a limit of 50 alphanumeric characters.
- Repeat this setup for any additional codes you want to associate with the issuing authority.
- The **Disabled** checkbox can be used to disabled any existing codes.
- When finished with setup or making any changes, select the SAVE button at the top of the frame.

Driver License Classes

A Driver License from a particular authority will have certain vehicle allowances and driver related restrictions. These allowances are represented as Driver License Classes.

This is how you record what classes of vehicles (size, weight) a driver is qualified to drive.

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Driver License Classes

Driver Licence Authority and Type

Issuing Authority: Description:

Licence Type: Description:

Driver Licence Classes (Loaded 5 records)

Code	Description	Restrictions	Disabled	Note
EMERG	Emergency Response Vehicles	Emergency Personnel Only	<input type="checkbox"/>	<input type="button" value="Note"/>
PATROL	Patrol Car	Police Only	<input type="checkbox"/>	<input type="button" value="Note"/>
SEDAN	Standard Company Vehicle	None	<input type="checkbox"/>	<input type="button" value="Note"/>
SNOW	Snow Removal	Seasonal	<input type="checkbox"/>	<input type="button" value="Note"/>
TRASH	Trash Collection	None	<input type="checkbox"/>	<input type="button" value="Note"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="Note"/>

- Enter or select the **Issuing Authority** from the list of values. The description automatically displays based on your selections.
- Enter or select the **Licence Type** from the list of values. Available selections will be determined based on the issuing authority chosen and the license types configured for that authority.
- After selection your authority and type combination, you can begin setting up or editing the **Driver Licence Classes**.
- The **Code** field has a limit of six alphanumeric characters.
- The **Description** field has a limit of 100 alphanumeric characters.
- **Restrictions** is a free form field with a limit of 50 alphanumeric characters.
- You can select the **Disabled** checkbox to disable any existing codes.
- Select the **Note** icon to add any notes to the licence class.
- When finished with the setup or editing, select **SAVE** at the top of the frame.

Driver Setup

Employee/Driver Main

Employee/Driver Main is a Screen Designer frame that combines the Employee Main and Driver Main frames into one frame.

This frame can be used to manage and maintain the Employee/Driver relationship from start to finish rather than using two separate frames.

Employee/Driver Setup

All Drivers will need to be created on Employee/Driver Main. The driver information will be entered on the Driver Information tab. Employees are enabled as drivers so they can be linked with Driver records.

As this guide is looking at Driver Management we will focus on the data required in the Employee/Driver setup that supports driver management.

Navigate to Employee/Driver Main. Create an Employee ID and Name, allocate an employee Status, assign a Home Location and Department, and then select SAVE.

Note: Employees can only be deleted if they are not linked to driver records and have no labor or charges booked against them.

1. Create an **Employee ID**. It is recommended to follow a consistent naming convention.
2. Enter an employee **Name**.
3. Set the employee **Status**.
4. Set **Driver** to **Yes** within the Position Information. This enables the driver related functionality for this Employee.
5. Enter a **Start Date** within Additional Information.
6. On the Assignment tab enter a **Home Location**. This is the primary location the employee will be based at.
7. Enter a valid **Department** for the Driver employee. Departments can be created by using Department Main.
8. Select SAVE.

Driver Information Tab

The screenshot shows the 'Driver Information' tab selected in a software interface. The tab bar at the top includes: General, Assignment, Payroll, Subordinates, Resource Type, Driver Information (active), and Motor Pool.

Driver Information

Driver Number: 16 Tax Form on file: Yes
 License No.: D345E89 License Expiry: 08/20/2019

Driver Codes

Driver Status: A Active Status: ACTIVE
 Driver Type: RG Regular Driver
 Driver Class: FULL Full Licence

Driver Address

Address: FM Garage 101
 Town/City: FLEETVILLE State/Zip: PA 19403
 Region: SOUTHEAST Municipality: ASSET TWNSHP
 County: FLEETVILLE COUNTY
 Mobile: 610-555-5556

You can begin the setup of driver-specific details for employees, including driver's license information and even attachments (for PDF license copies). Rather than navigating to Driver Main, you can begin the driver setup on this tab.

Note: This tab is read-only unless the **Driver** flag on the General tab is set to Yes.

Driver Main

Driver Main is a Screen Designer version of Employee Main with the driver information. Driver Main has the Employee Information at the top of the frame and the Driver Information in the first section of the General tab.

You can use this frame to create a new employee/driver record for an existing employee or to view and enhance existing Employee/Driver information created on Employee Main.

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ATTACH
RELATED ▾

Driver Main

Employee Information
Employee ID: Name: Status: ACTIVE ▾

+
General
License
Motor Pool Class

Driver Information
Driver Number: Tax Form on file: Yes ▾
License No.: License Expiry:

General Information
Home Location: FM FM Parking Location:
Department: OPERATIONS

Driver Codes
Driver Status: A Active Status: ACTIVE
Driver Type: RG Regular Driver
Driver Class: FULL Full Licence

Shift Information
Shift Code: MON - FRI 6 AM TO 2:30 PM
Effective Date:

Select the License tab. This is where you can record License information for the Driver. You will need to add a Driver License Item and then link any License Classes to it. You can add multiple licenses for previous issues or for additional licenses from different authorities. These are not mandatory.

SAVE

UNDO

REFRESH

DELETE

FIND

ATTACH

RELATED ▾

Driver Main

Employee Information

Employee ID:
Name:
Status:

+

General

License

Motor Pool Class

Driver License Items (Loaded 0 records)

Authority	Type	Valid From	Expiry	Licence No	Issue	Passed	Renewal	Serial No	Ref. No	Attach	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

At a glance you can view the types of vehicle the driver is legally permitted to operate, and which authority allows it.

- Select the driver license **Authority** (you can access the LOV or enter the correct value).
- Select the driver license **Type** (you can access the LOV or enter the correct value).
- Enter the rest of the fields on this row. They are no longer validated but are required.
- Select SAVE. This should allow you to access the License Classes grid when you have a License Item highlighted. You can select the **Add Classes** button.
- Enter a license class **Code** (you can access the LOV or enter the correct value). This automatically displays the description.
- Enter **Acquired** and **Valid To** dates and enter the rest of the information on the row, if applicable.
- Select SAVE.

Driver Event Management - Configuration

Driver Event Classes

These are the highest classification of Driver Events. For example, medical checks or training courses for drivers.

Navigate to the Driver Event Classes frame. Enter a Class code, Description, and then select SAVE.

SAVE

UNDO

REFRESH

DELETE

FIND

Driver Event Classes

Driver Event Class (Record 1 of 17)

Class	Description	Disabled
ACCIDENT	Driver Accident History	<input type="checkbox"/>
ADR	tester	<input type="checkbox"/>
CN-DR-EVENT1	Driver Event 1	<input type="checkbox"/>
CN-DR-EVENT2	Driver Event 2	<input type="checkbox"/>
CN-DR-EVENT3	Driver Event 3	<input type="checkbox"/>
CNMAXDEVTCLA	max event class 12 char	<input type="checkbox"/>
CTEST	cerys test	<input type="checkbox"/>
DISABLED	Disabled event class	<input type="checkbox"/>
EXPRIFNCF	Driver Experience	<input type="checkbox"/>

Driver Event Types

This is the next level of classification.

Navigate to the Driver Event Types frame. You can create the overall tests or checks that will be happening. If there are specific elements involved in a particular check then they are created at a further step.

SAVE UNDO REFRESH DELETE FIND

Driver Event Types

Driver Event Class
Event Class: Description:

Driver Event Types (Loaded 5 records)

Code	Description	Expiry Notification	Pre-Expiry Notification	Notification Frequency	Disabled
1/2 YEAR	<input type="text" value="1/2 Year Eye Test"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="N/A"/>	<input type="checkbox"/>
TEST ABSOLUT	<input type="text" value="Test Absolute"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="N/A"/>	<input type="checkbox"/>
TEST RELATIV	<input type="text" value="Test Relative"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="N/A"/>	<input type="checkbox"/>
VEAD	<input type="text" value="Year Eye Test"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="N/A"/>	<input type="checkbox"/>

Driver Event Risk Management

You can optionally configure the rules and define the associated priority and risk for the Event Type. These rules allow you to manage and rate Events.

Navigate to the Driver Event Risk Management frame. Here you set up what the scoring parameters of the Event Type are. When it comes to entering an event for a driver only one score may be chosen, so the options need to represent a unique result.

High Level:

- Allows you to assign risk factors to specific Event Types and then forecast driver events two years into the future.
- **Event Rank** - Value from 0 to 99.9 to denote the importance or priority of the event.
- **Overdue Score** - Value from 0 to 99.9 to display on the query frame when an event passes the due date (is multiplied by the Event Rank).
- To forecast, must be a **recurring** event with a specified interval.
 - Absolute or Relative
- **Event Scores** - Values from 0 to 99.9 that are assigned to situation or impact values (also multiplied by Event Rank).

SAVE
UNDO
REFRESH
DELETE
FIND

Driver Event Risk Management

Driver Event Risk Management

Event Type: Description:

Event Rank: Timescale:

Key Event: Overdue Score:

Mandatory: Driver Group:

Recurring: Driver Group:

Days: Basis: Forecast 2 years

Event Scores (Loaded 4 records)

Situation/Impact	Score	RAG	Disabled
MAJOR	<input type="text" value="5.0"/>	<input type="text" value="RED"/> ■	<input type="checkbox"/>
MINOR	<input type="text" value="1.0"/>	<input type="text" value="GREEN"/> ■	<input type="checkbox"/>
MODERATE	<input type="text" value="3.0"/>	<input type="text" value="AMBER"/> ■	<input type="checkbox"/>
NONE	<input type="text" value="0.0"/>	<input type="text" value="NONE"/> ■	<input type="checkbox"/>

Event Type - The Event Type code you are setting up.

Event Rank - The importance of the test. This will multiply with the selected score (for example, if you selected UNDER 25 on the above event you would score 18 [9 * 2]). This is to signify how

some events have a bigger impact than other events (for example, a check on the number of convictions may be more critical than a check if the driver has read the user handbook).

Key Event - If the event is particularly important. This is a reference field and does not have any systematic impact.

Mandatory - If the event is mandatory. This is a reference field and does not have any systematic impact.

Recurring - If the event is to happen once or repeat regularly.

Days - Combines with the Recurring flag – how many days are to pass before this event recurs? When you save a Driver Event in Driver Event Entry, a new Event will be created due in this many days. If a future one already exists it will change the due date to align it with the recurring days provided there is no actual date against that event yet.

Description - Automatically displays the description of the selected Event Type Code.

Timescale - How long you want this event to last before it goes overdue and must be retaken. This is applied per driver Event Date.

Overdue Score - When the event goes overdue it defaults to this score (this will also multiply with the Event Rank).

Driver Group - This is the Driver Group that the adjacent Mandatory/Recurring flag applies to. Populate if you want the Event to be mandatory or recurring to a specific driver group. If blank it will apply globally.

Basis - Set to Absolute or Relative. Set Absolute if you want the recurring date to be fixed to what the Event Date is in Driver Event Entry, and Relative if you want the recurring date to calculate from what the Actual Date is in Driver Event Entry.

Situation/Impact - The description of the scores available for this Event.

Score - The scoring value of the Situation/Event. These multiply with the Event Rank.

RAG - The color associated with each result (Red/Amber/Green). You can use each color more than once or not at all.

Disabled - If you want the Situation/Impact to be unavailable for future selection.

Driver Event Items

This is where you set up specific elements associated with an Event Type. They act as additional fields of reference to be entered with an Event score.

Navigate to Item Master Definition to create the items. They are then linked to the event type at the frame in the next section. You can define here if the Items are mandatory, require a validated value, define those validated values and set a default value.

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Items Master Definition

Item Selection
 Type: Driver Event

Driver Event Item Information (Record 4 of 6)

Item	Type	Mandatory Item	Validated Value	Default Value	Disabled
CN-DRIVER-ITEM001	Character	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
CN-DRIVER-ITEM002	Character	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
PMC	Character	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
SCORE	Character	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	<input type="checkbox"/>
TEST	Character	<input type="checkbox"/>	<input type="checkbox"/>	TEST	<input type="checkbox"/>
TEST1	Character	<input type="checkbox"/>	<input type="checkbox"/>	TEST1	<input type="checkbox"/>

Driver Event Values for SCORE (Loaded 6 records)

Value
0
10
2
4

1. Change the Type dropdown to Driver Event.
2. Select an empty space under Item and enter the item description.
3. Select if it is a Character, Number or Date Type value.
4. Select if it is mandatory or not.
5. Select if it is validated or not.
 - If it is validated, then select the column that appears underneath and enter the values for selection.
6. If there is to be a default value for the item, enter it here.
7. Use the final column to denote if it is disabled or not.
8. SAVE.

Then navigate to Driver Event Items. This is where you link the items to the particular Event Types. An event item can appear on multiple Event Types.

SAVE

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Driver Event Items

Driver Event Class & Type

Event Class: ACCIDENT

Description: Driver Accident History

Event Type: ACCIDENT01

Description: Number of Accidents (last 2 years)

Driver Event Items (Loaded 3 records)

Event Item	Disabled
PMC	<input type="checkbox"/>
TEST	<input type="checkbox"/>
TEST1	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>

1. Enter the Event Class.
2. Enter the Event Type.
3. Double-click a blank row in the grid to bring up the LOV and select the item to link.
4. Select SAVE.

Entering & Viewing Driver Events

Driver Event Entry

This is where you complete an event record for a driver. This frame has three forms of validation to a particular event entry, Driver Number, Event Type and Event Date.

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ATTACH

Driver Event Entry

Driver Event Entry

Driver No: JSMITH

Name: John A. Smith

Status: Active

Event Type: ACCIDENT01

Number of Accidents (last 2 years)

Rank: 2.0

Event Class: ACCIDENT

Driver Accident History

Event Date: 08/20/2018

Event Scheduling

Planned Date:

Actual Date: 08/20/2018

Expiry Date: 08/20/2019

Pre-Expiry Notification Count:

Expired Notification Count:

Event Comments

Event Detail: Test Entry for New Driver

Event Location: City Center

Reference: A345

Comment: Testing for New Driver

Result: PASS

Situation: MINOR

1.0

Score: 2

Driver Event Entry (Record 2 of 3)

Item	Type	Mandatory	Validated	Value
PMC	Character	<input type="checkbox"/>	<input type="checkbox"/>	2
TEST	Character	<input type="checkbox"/>	<input type="checkbox"/>	
TEST1	Character	<input type="checkbox"/>	<input type="checkbox"/>	

1. Enter the Driver No. This displays the Name and driver Status.
2. Enter the Event Type. This displays the description, Rank and Class details.
3. Enter the Event Date. This is the date the Event is scheduled to take place.
4. Enter the Actual Date. This is the date the Event actually took place. It can be the same as the Event Date or it can be different.
5. Enter the Expiry Date. This is when the Event will expire and potentially need to be retaken.
6. The following information is not mandatory:
 - a. Enter the Event Detail. This is a free form field for details on the Event.
 - b. Enter the Event Location. This is where the Event took place.
 - c. Enter a Reference. This can be a reference number associated with this Event/Driver/Date.
 - d. Enter comments. These could be supporting the Result or additional information that needs to be recorded.
 - e. Enter a Result. This could be PASS or FAIL. Alternatively the Event could not have a definable result and just have a score.
7. Enter the Situation. This is the Event result. This determines the numerical result, color and calculate the Score based on what the Event Rank is.

8. If there are Event Items these display. Enter these as appropriate.

Driver Event Entry (Record 2 of 3)

Item	Type	Mandatory	Validated	Value
PMC	Character	<input type="checkbox"/>	<input type="checkbox"/>	2
TEST	Character	<input type="checkbox"/>	<input type="checkbox"/>	
TEST1	Character	<input type="checkbox"/>	<input type="checkbox"/>	

9. Enter Notes at the bottom for any additional notes.
10. After completed select SAVE.
11. If the event is recurring then a future Driver Event generates depending on the configuration in Driver Event Risk Management. If there is already a future event existing then it will reschedule to align with the recurring days **provided** there is no Actual Date set against that future event yet.

Driver Event Query

Navigate to Driver Event Query. From here you can view all of the Event entries for Drivers and Dates. You can enter details to make the query specific to Driver Departments, Drivers, Event Classes, Event Types, or you can do a blanket search for everything in a date range. A date range is mandatory to do a search.

SAVE UNDO REFRESH DELETE FIND

Driver Event Query

Driver No: JSMITH John A. Smith
 Department:
 Event Class: Event Type:
 Start: 08/20/2018 End: 08/20/2019 Event Expiry Date:
 Clear Retrieve

Driver Event Query (Loaded 1 records)

Driver No	Evt. Type	Evt. Class	Event Dt	Actual Dt	Expiry Dt	Result	Score	Location	Reference
JSMITH	ACCIDENT01	ACCIDENT	08/20/2018	08/20/2018	08/20/2019	MINOR	2	City Center	A345

1. Enter the information you want to search on.
2. Enter a Start and End date and select from the dropdown which date you are searching against.

Event Expiry Date:
 Event Actual Date:
 Upcoming Events
 Overdue Events

3. Select Retrieve to bring back results.

4. You can select the blue hyperlinked dates to bring up the Driver Event Entry record. From there you can review or make changes.
5. The RAG (Red, Amber, Green) color determines if the event is overdue or not.

RAG Logic

Non-Completed Events:

- Event Date is 1 day or more in the past – RED
- Event Date is < = System Flag 5360 value – AMBER
- Event Date is > = System Flag 5360 value – GREEN

Completed Events:

- Result score entered on Driver Event Entry when entering actual date determines color.

Department Event Query

This frame list (by department) the event types, classes and rank, the number of drivers, average score and total score.

SAVE
UNDO
REFRESH
DELETE
FIND

Department Event Query

Department:

ADR's Test Department

Event Class:

Event Type:

Start:

End:

Within last 365 days ▼

Clear
Retrieve

Driver Event Query (Loaded 8 records)

Department	Evt. Type	Evt. Class	Evt. Rank	Drivers	Avg. Score	Tot. Score
2776	ADR	ADR	1.0	4	10	40
2776	1/2 YEAR	EYE TEST	10.0	2	75	150
2776	MAC EVENT	MACDRIVERCLS	10.0	4	75	300
2776	ADR3	ADR	10.0	4	100	400
2776	ANNFIT	HEALTH		1	0	0
2776	FIVE	CTEST	1.0	1	0	0
2776	ADR2	ADR	10.0	3	100	300
2776	MAC EVENT 2	MACDRIVERCLS	1.0	1	0	0

The Department hyperlinks open the Driver Event Query frame with the information for that event. From there, you can select the Event Date hyperlink to open the Driver Event Entry frame.

Department Driver Scores Query

Department Driver Scores Query is a frame that allows for reporting by department, lists each driver in a particular department, how many events have been completed, missed, the total score and the average score per event.

This information is basically aggregated Driver Event data from previous entries on the Driver Event Entry frame. It allows you to view the data a high level and then drill down to specific events if necessary.

The Driver No. field is a hyperlink that opens the Driver Event Query frame with the events loaded for that specific driver.

SAVE
UNDO
REFRESH
DELETE
FIND

Department Driver Scores Query

Department: EXECUTIVE

Event Class: Event Type:

Planned Date From: To: Within last 365 days ▼

Clear
Retrieve

Department Driver Event Scores (Loaded 43 records)

Department	Driver No	Driver Name	Completed	Missed	Total Score	Avg. Score	
0010	004001	Doe, Jane	1	84	100	1.18	
0010	34567	Harry Chapin	0	120	359	2.99	
0010	42592854	TEST,TEST	0	103	255	2.48	
0010	51118	TESTEDM	0	22	109	4.95	
0010	6017366	SMITH,JOHN	0	103	255	2.48	
0010	DRIVER1	Driver 1	3	23	218	8.38	
0010	DRIVER2	driver 2	0	23	119	5.17	
0010	JPD	Test Employee	0	120	359	2.99	
0010	LAPD	LAPD Employee	0	103	255	2.48	
0010	21	Brian Minor	0	120	359	2.99	
0010	27012342	HEXTALL,RON	0	103	255	2.48	

Notifications

There are three driver notifications available on the Notification Manager frame:

1. DRIVER EVENT APPROACHING EXPIRY
2. DRIVER EVENT EXPIRED
3. DRIVER EVENT-HIGH RISK

Driver Event Approaching Expiry

- Event Type must have Pre-Expiry Notification checkbox selected.
- Frequency option will be evaluated along with current date.

Driver Event Expired

- Email triggered once event passes expiry date.

Driver Event High Risk

- Generated when event turns R through either being past the Event Date or by being assigned a scenario score that results in R upon completion.

Training Coordinator Setup

- Define department item on TRAINING COORDINATOR item master.
- Assign a value to that item on Department Items frame on a department basis.
- That email address will be tied to the Employee/Driver Main record department value.

System Flag 5498

- When set to N, Driver Events with an expiry date in the past that do not have an actual date populated will still send a High Risk notification when set up to do so, as well as an expiry notification, if set up to do so.
- When set to Y, If an event has no Actual Date and its expiry date is in the past, do not send the High Risk Notification on the initial entry, only send the High Risk notification when the Situation is set up for a score that is a RED value. This will cause High Risk notifications to only be sent when a user chooses a Situation that is setup as RED by using the Driver Event Risk Management frame.

Driver Event Approaching Expiry

Event Information (DRIVER EVENT APPROACHING EXPIRY)

Subject:
Driver Event Type :T will soon expire for driver :D ***ASSETWORKS TEST MESSAGE***

Message:
Driver Event Type *:TD " will expire for driver :DN on :ED . Notification :C of :NF
ASSETWORKS TEST MESSAGE

☒ Available ☒ Assigned

Driver Department Email
Driver Email Address
Training Coordinator Email

Employee Supervisor Email

Message Variables
:C = Pre-Expiry Notif
:D = Driver Number
:DN = Driver Name
:E = Emp No
:ED = Expiry Date

Disabled: No

Up to four email addresses can receive emails if a driver event is about to expire: Driver Department Email, Driver Email, Employee Supervisor Email and Training Coordinator. In order to use Training Coordinator as an email recipient, a TRAINING COORDINATOR department item must be set up. The event will be looking at the Expiry Date on DRIVER EVENT ENTRY to be less than whatever frequency is chosen as well as no Actual Date on DRIVER EVENT ENTRY.

In order to use this notification, some flags must be set on the Driver Event Types frame.

Driver Event Types

Driver Event Class
Event Class: LIC EXP Description: License Expiry

Driver Event Types (Loaded 5 records)

Code	Description	Expiry Notification	Pre-Expiry Notification	Notification Frequency	Disabled
APPROACHING	Approaching	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
COMPLIANT	Compliant	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
DUE	License Due	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Two Weeks	<input type="checkbox"/>
NON-COMPLIANT	Non-Compliant	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
OVERDUE	Renewal is late	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>

For each event class and event type, a pre-expiry notification can be sent based on the frequency selected. The user would need to select the checkbox for Pre-Expiry Notification and select the frequency of either 1 week, 2 weeks, 1 month or 2 months.

Driver Event Calendar (Year)

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Driver Event Year Calendar

Driver No:

Department:

Event Class: Event Type:

Month: Year:

Grouping Options: ☐ None ☒ Department ☐ Event Class ☐ Event Type

Clear Retrieve Prev Month Next Month

Driver Event Year Totals

Totals	2020 June	July	August	September	October	November	December	2021 January	February	March	April	May
Total	8	9	9	9	8	8	8	8	8	8	10	8

Driver Event Calendar (Monthly)

SAVE UNDO REFRESH DELETE FIND

Driver Event Calendar

Driver No:

Department:

Event Class: Event Type:

Month: Year:

Clear Retrieve Prev Month Next Month

Driver Event Calendar (Loaded 5 records)

Driver No	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
11031978										1																				
11031979				5																										
D103																								1						
D104																								1						
MLEMP								1																						

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.