

You can create or update drivers by entering information into the web portal one at a time, or you can manage drivers in a batch process by importing data from a spreadsheet.

Enter Driver Information

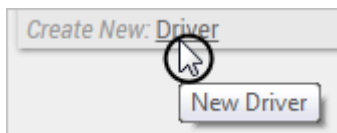
Entering drivers information manually is often used when you have a small number of drivers (1-5) to register at a time.

► To enter information for a new driver:

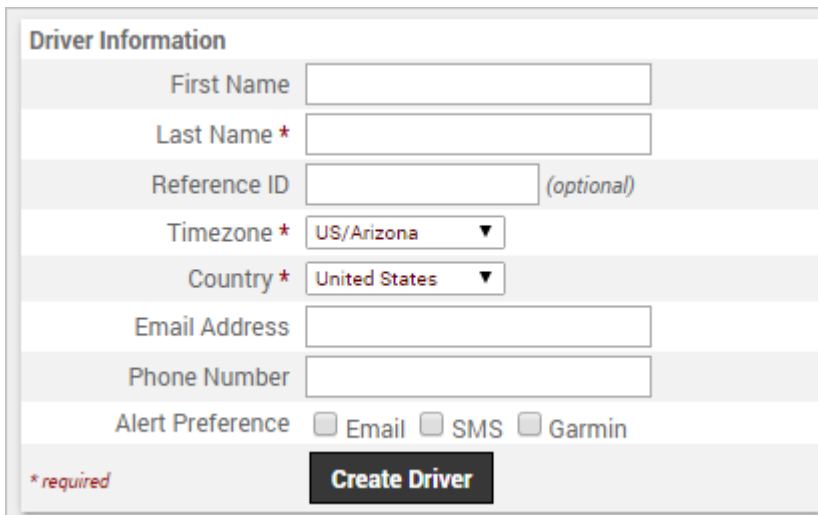
1. From the portal, hover over the **Account** menu, click **Manage Drivers**, and click **Open**.

The Manage Drivers and Groups page opens in a new browser tab.

1. At the bottom of the Driver List grid, click **Driver** next to Create New.



1. In the Add New Driver window, enter the driver details: First Name, Last Name, Reference ID, Timezone, Country, Email Address, Phone Number, and Alert Preference.



Note. Reference ID allows you to optionally identify drivers by an ID that's understood at your company (e.g., employee ID). If you use **Hours of Service**, the Reference ID must match the driver's HOS ID. Timezone is used to accurately timestamp alerts received by the driver.

1. Click **Create Driver**.

A message appears to indicate the driver was successfully saved. A new driver group, "Drivers for [your username]," was also automatically created. (Click the group name from the Driver Group List grid if you want to rename it.)

1. Filter the Driver List grid using the new driver group to see the new driver.

Import Drivers

The portal provides several options for **importing and exporting data to and from a spreadsheet**. You can use the import option for registering a large batch of drivers.



Tip! If you already have data in the portal, it's a good practice to first **export the data** for safe-keeping so that you can restore if you later make a mistake in your import.

The maximum number of rows spreadsheet upload accepts is 1,500. If your spreadsheet has more than this number it is recommended to break it up and perform multiple uploads for each group of 1,500 until it is complete.

► To add new drivers by importing from a spreadsheet:

1. From the portal, hover over the **Account** menu, click **Manage Drivers**, and click **Update/Export items using a spreadsheet**.
2. Download one of the CSV Example templates (**1**, **2**, or **3**) next to the Create New users spreadsheet action.
3. Within the spreadsheet, column names appear in Row 1 and an example record appears in Row 2. Replace Row 2+ with your own data.



Note. Fields in the Reference column on the Update/Export page are required. If your spreadsheet has duplicate data rows for a reference column, such as two rows with the same driver ID, the spreadsheet upload will only import one record using the last row of data.

Available columns for driver import include: Driver Full Name OR Last Name OR Reference ID, Reference ID Update, First Name, Timezone, Email Address, Phone Number, Alert Preferences, Driver ID, Driver Group.



Note. Driver ID refers to the identifier on a DriverID keyfob (if used). Driver Group refers to the **driver group(s)** to which the driver belongs. If you have multiple items within a cell, use the following delineator(s):

- ~ - full path for **hierarchy** (e.g., Company Name~East~Northeast)
- : - multiple assignments (e.g., Vehicles:Drivers)
- ; - multiple items (e.g., red;gray)

1. Click **File > Save**.
2. From the portal in the Spreadsheet Actions grid, click the **Create Drivers** option.
3. From the Import Step 1: Upload CSV or Excel File grid, click **Choose File**.
4. In the Open window, browse to the location where you saved the file for import, and double-click it.
5. Click **Upload Now**.

The Import Step 2: Define Columns grid appears. This grid allows you to see how your spreadsheet column names will be applied to the appropriate fields in the portal. Set any fields marked "IGNORE" to the appropriate column name.

1. Click **Preview the Import**.

The Import Step 3: Preview Import Data grid appears. This grid allows you to verify the data that will be imported. Valid values for reference fields will be marked with a green check box.

1. Click **Proceed with Import**.

The Import Step 4: Import All Data grid appears. This grid provides a summary of the import results. If any rows were skipped, they will be listed here with the reason they were not imported.

1. From the menu at the top of the page, click **Drivers** to view the new drivers that were imported.



Note. Certain Spreadsheet Upload Actions can update only one column at a time. For example, the Attribute Update process would need to be performed twice to update the Car Color then the Car Type attribute. You would choose "-Ignore-" for one of the attributes during each upload so only one was chosen. (That the column header on that particular spreadsheet is the actual Attribute Name as entered in the system. This name must be listed in the first row to designate the Attribute Name for Attribute update.) The Hierarchy Update the spreadsheet process is similar in that you would perform it twice to assign a vehicle to two different Hierarchy Trees.