



Driver Safety Scorecards

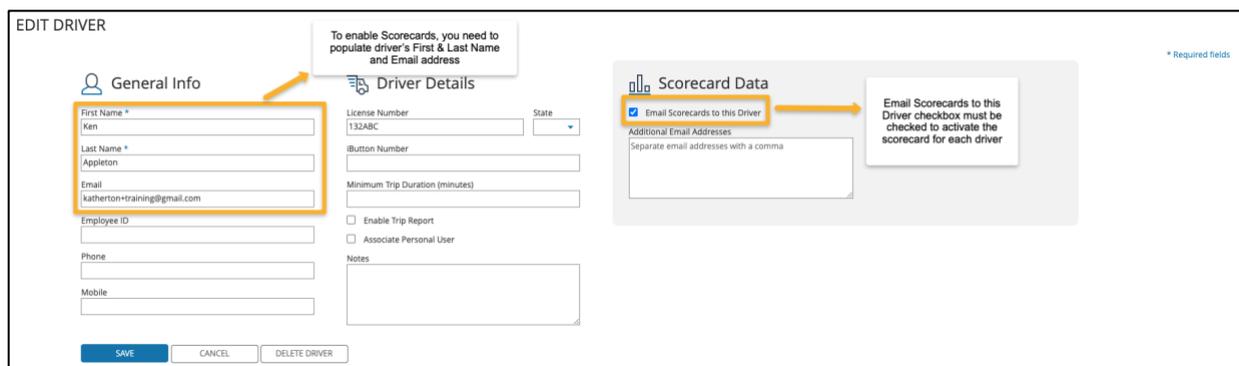


Scorecards enable organizations to identify risk and promote a positive safety culture. Scorecards are designed to provide Drivers and Supervisors a weekly snapshot that allows them to self-correct their riskiest behaviors, while recognizing areas they are already displaying safe driving.

Setting up Driver Scorecards

Driver Scorecards are automatically sent every Monday to each driver who drives at least 30 minutes during the scoring period via a pdf email.

1. Navigate to the Setup Tab.
2. Click “Drivers.”
3. Select an existing driver you wish to enable scorecards for or select “New Driver” to create a new driver to enable a scorecard.
4. Under the “Scorecard Data” panel, checkmark the box to “Email scorecards to this driver.”
5. Make sure the driver has an email listed under the Email field.
6. If you wish to add a supervisor to receive the individual driver scorecard, add their email to the “Additional Emails” box.
7. Don’t forget to click Save.



EDIT DRIVER

To enable Scorecards, you need to populate driver's First & Last Name and Email address

* Required fields

General Info

First Name *
Ken

Last Name *
Appleton

Email
katherton+training@gmail.com

Employee ID

Phone

Mobile

Driver Details

License Number
132ABC

State

Button Number

Minimum Trip Duration (minutes)

Enable Trip Report

Associate Personal User

Notes

Scorecard Data

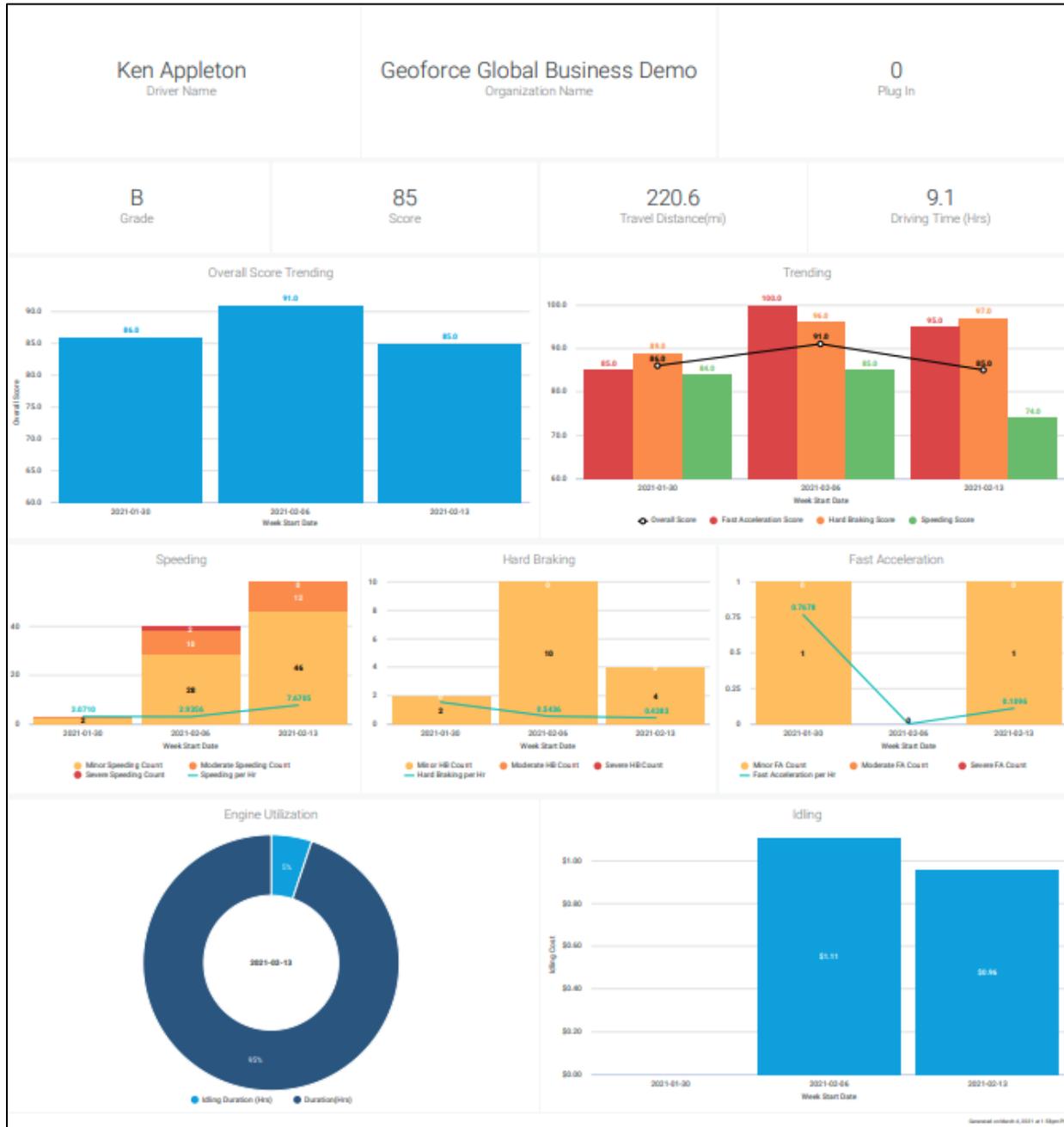
Email Scorecards to this Driver

Additional Email Addresses
Separate email addresses with a comma

Email Scorecards to this Driver checkbox must be checked to activate the scorecard for each driver

SAVE CANCEL DELETE DRIVER

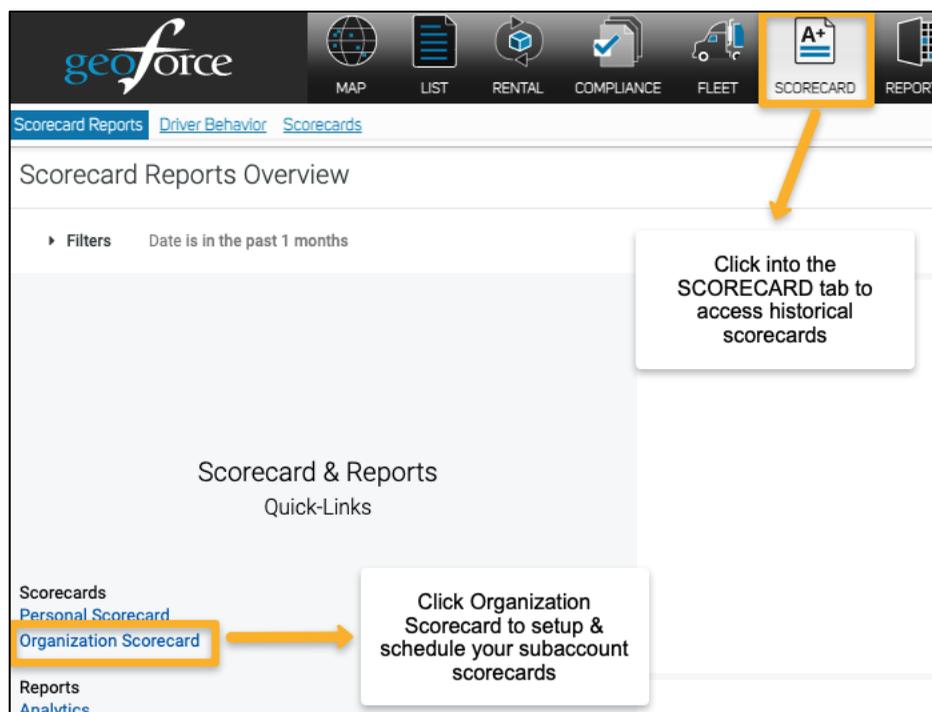
Example Driver Scorecard



Scheduling Organization Scorecards

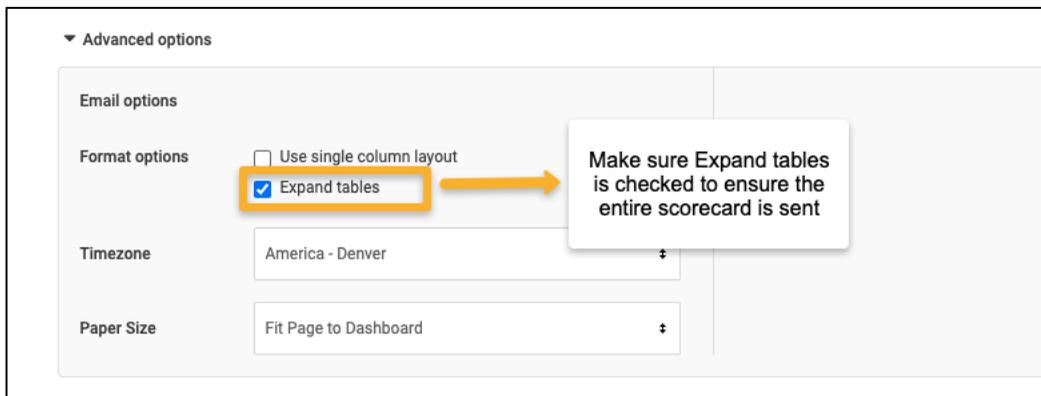
Organization Scorecards are supervisor-level scorecards that include all the drivers within an Account or Subaccount. These need to be scheduled within the system to generate and send to supervisor teams.

1. Navigate to the Scorecard tab.
2. Click “Scorecards Reports.”
3. Select Organization Scorecard from left panel.

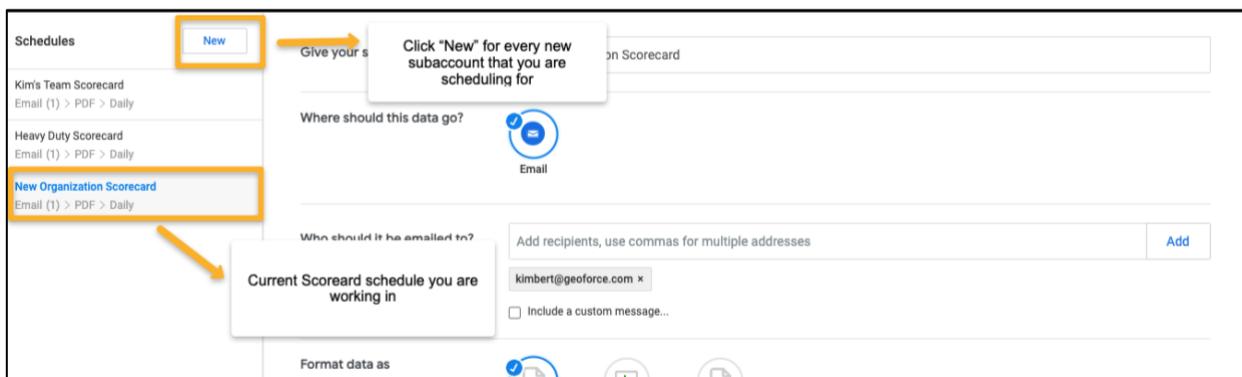


4. Click the gear icon in top right corner.
5. Select Schedule.
6. Name your Scorecard so you can recognize it in a list if you are scheduling more than one Scorecard or Report.
7. Add email recipients (including yourself if you do not see your email listed already).
8. Adjust additional filters such as Report Format (PDF, Visualization, CSV) and Delivery Schedule. *PDF is the best format for any Scorecards and Weekly on Monday’s will match your driver scorecard cadence.

9. **Important!** Under filters, select the current account you are working in under the section labeled “Organization Name.” If you do not select the organization filter, the scorecards will all send with the same account information.
10. Under Advanced Options, check the box to “Expand tables” to ensure the entire scorecard is sent instead of a cropped version.



11. Click “Save All” to save your scheduled report.
12. Repeat steps above for every Subaccount that you want to schedule for by navigating into each Subaccount and clicking the “New” button in the scheduling panel on the left-hand side. You should see a list of all your scheduled reports, including Scorecards, in this panel.



Example Organization Scorecard

