



FLEET MANAGER PORTAL USER GUIDE



RSA smartfleet

DRIVING GROWTH
THROUGH EFFICIENCY

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Thank you for taking out RSA SmartFleet with your Mini Fleet policy. In the following guide we will show you how to get started and make the most of the information you will receive once all your vehicles and drivers are connected.

To get started, you will need the names and email addresses of all your drivers that you wish to give access to the RSA SmartFleet app. This is to send the app download instructions to, so should be an email address that they can access from their phone.

To register yourself, you will also need your email address and the policy number of your RSA Mini Fleet policy. These will all be used during the registration process.





GETTING STARTED AND FIRST-TIME ACCESS

Registration

You should have received an email from your broker containing a link to the RSA SmartFleet Fleet Manager Portal. Visit the link and input the required information to register. You will need to enter:

- The email address that your registration email was sent to.
- Your RSA Mini Fleet policy number.
- A unique password consisting of eight characters, including one capital letter and two numbers.
- To proceed, you will also need to read our Terms & Conditions and confirm that you have done so.

Clicking Register will trigger a second email with a link taking you to your login screen. This adds an extra layer of security to the registration process and keeps your details safe.

NB: A version of this user guide including screenshots is available online at www.rsabroker.com/rsa-smart-fleet-broker-toolkit

LOGGING IN

Following first registration, this is the screen you will see when you go to access the portal.

On this screen you will need to re-enter:

- The email address that your registration email was sent to.
- Your RSA Mini Fleet policy number.
- Your password.

You can click Remember Me to save time when logging on in future.

Once logged in, you will be taken to your Home screen.

Home screen part 1 – Vehicles view

This page shows a list of all the vehicles you have insured under this policy with RSA. Check these and if you think there are any vehicles missing or any of the details are incorrect, please contact your broker.

Ignore the rest of the screen for now as we will explain this in detail later.

If everything is in order then click the Drivers heading to get started.

Home screen part 2 – Drivers view

The first time you enter the Drivers view of your Home screen you will see that the Drivers list is empty.

You will be prompted to click the Plus icon to start adding their details.

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RSA SMARTFLEET

A guide to using the portal for Fleet Managers.

This guide assumes you have already completed the registration process and paired your drivers and vehicles together.

If you have not yet done so, or are having trouble doing so, please refer to our guide Getting Started With RSA SmartFleet for further information.



01. NAVIGATING THE PORTAL

Section 1 Overview



When logging in you will be prompted to provide your email address, password and policy number.

Selecting the Remember Me check box will pre-populate your login details for future visits but you will still need to enter your password.

To submit the information, select the Log In button. If the information entered is correct, you will be taken to the Home screen.

If any of the information entered is incorrect, then a message will appear to advise of this and ask you to try again.

If you have not yet registered then you will not be able to log in. Please refer to our guide Getting Started With RSA SmartFleet for further information on how to register.

Section 1 Home screen – Vehicles



The Vehicles section on the Home screen shows your RSA SmartFleet enabled vehicles. It also shows the mileage recorded by the app, the overall score and that score split into the three main ratings used – Speed, Smoothness and Usage (more information on scores later in this guide).

Viewing data by date

You can view data recorded since the start of the period of insurance – year to date (YTD), the last 24 hours, seven days or 30 days. This can be toggled using the buttons on the top right above your vehicle info.

Viewing data by performance

Vehicles will be shown with the lowest scoring at the top. Selecting one of the headings will change your sort options. For example, to see which vehicle has the highest recorded mileage, just select Total Miles and the highest will jump to the top, with the rest in descending order.

This screen allows you to quickly see if a particular vehicle is being driven better or worse, more often or for more miles than others.

The icons next to each vehicle work as follows:



Shows which drivers have been linked to this vehicle.



Shows the last recorded location of this vehicle on a map.



Shows the latest journeys recorded for this vehicle.



Shows a league table of all the drivers who are assigned to this vehicle.

We will explain these in more detail later.



The Drivers section on the Home screen shows your RSA SmartFleet registered drivers. It also shows their mileage recorded by the app, the overall score and that score split into the three main ratings used – Speed, Smoothness and Usage (more information on scores later in this guide).

Viewing data by date

You can view data recorded since the start of this period of insurance – year to date (YTD), the last 24 hours, the last seven days or the last 30 days. This can be toggled using the buttons on the top right above your driver info.

Viewing data by performance

Drivers will be shown with the lowest scoring at the top. Selecting one of the headings will change your sort options. For example, to see which driver has the highest recorded mileage, just select Total Miles and the highest will jump to the top, with the rest in descending order.

This screen allows you to quickly see if a particular driver performs better or worse, drives more often or does more miles than others.

The icons next to each driver work as follows:



Shows which vehicles this driver has been linked to.



Shows the last recorded location of this driver on a map.



Shows the latest journeys recorded for this driver.



Shows a league table of all the vehicles to which this driver has been assigned.

We will explain these in more detail later.



When the League Table icon is selected from the Home screen the League Table screen is displayed for the selected driver or vehicle.

If you access this from the Vehicle Home screen you will see all of your drivers who have recorded a journey in this vehicle in the selected time period.

If you access this from the Driver Home screen you will see all the vehicles in which this driver has recorded a journey in the selected time period.

Viewing data by performance

The default view is the driver or vehicle with the lowest overall score at the top. As with the Home screen, selecting a column header will rearrange the information displayed. For example, to see which vehicle a driver did the most miles in, select Total Miles, or to see which driver had the worst Speed score in a particular vehicle, select Speed.

For more information on Driving Scores, please refer to **Checking and Understanding Driver Scores** later in this guide.



Section 1 Vehicle and driver locations



To see the last recorded location of a vehicle or driver, select the Location icon from the relevant home screen.

To see the last recorded location of ALL vehicles or drivers, select the Show All Locations button from the relevant home screen.

The last recorded location isn't necessarily the vehicle or driver's current location, it is the last time that your driver's RSA SmartFleet app was able to provide data to the Fleet Manager Portal. This can be affected by availability of GPS, internet connectivity and weather conditions.

For more information on what can affect the quality of recorded data, please refer to our **FAQs** at www.rsabroker.com/rsa-smart-fleet-broker-toolkit

Section 1 Vehicle and driver journeys



When the Journey icon is selected the Latest Journeys screen is displayed for the selected vehicle or driver.

This will show every journey we have recorded for the vehicle or driver selected in the last 30 days, seven days or 24 hours. Along with their overall score for the journey, the journey's start time, end time, maximum speed, distance and duration. You will also see any journeys currently being recorded, giving you up-to-date information on the whereabouts of your vehicles and drivers.

Keeping track of your fleet

For drivers, this screen will also show which vehicle they were connected to at the time of the journey. For vehicles it will show which driver was connected to the vehicle at the time.

For information on individual journeys, select the Journey icon again from this screen for the journey you wish to know more about.

Journeys are not always 100% accurate and can be affected by availability of GPS, internet connectivity and weather conditions, or issues with Bluetooth connectivity. For more information on what can affect the quality of recorded data, please refer to our **FAQs**.

What you won't see

Any journeys recorded while the driver has Private Mode active will not appear here. For more information on Private Mode, please refer to our **FAQs**.

Section 1 Individual journeys



When the Journey icon is selected from the Latest Journeys screen, further detail is displayed for the selected journey.

This new view will generate:

- A map for the selected journey, showing the start and end points.
- Each of the individual recorded points.
- Any notifications of speeding.
- The direction the vehicle was travelling.

The map can be interrogated the same as any other online map service and can be zoomed and moved around as necessary.

Keeping track of your fleet

A breakdown of the overall score for the journey is also displayed, showing individual scores for Speed, Smoothness and Usage. For more information on Driving Scores, please refer to Checking and Understanding Driver Scores on Page 16.

Section 1 Individual journeys



In addition, you will see a list of Events recorded during this journey below the map, including:

- Journey start.
- Position updates.
- Speed alerts.
- Journey end.

Selecting the Location icon for an event here will highlight where that event occurred on the map.

Exporting a journey report

You can generate a PDF file of the journey by using the Export button.



Scores for drivers and vehicles are shown on your Fleet Manager Portal on the Home screen and the Latest Journeys screen. Individual Journey scores are also shown in more detail on the Journey Detail screen.

Drivers can also review their scores on their smartphones, using the RSA SmartFleet app.

Speed: This is a measurement of the speed driven compared to the speed limit of the roads used. Poor scores indicate a higher frequency of speeding events or occasional excessive speed.

Smoothness: This is a measurement of the smoothness of acceleration, braking and cornering. Poor scores indicate fast acceleration or cornering, or sudden braking.

Usage: This is a measurement of certain times and locations. Poor scores can indicate a high percentage of use at rush hour, on busy streets or in accident black spots.

Taking action

For further information on the impact of poor driving and what you and your drivers can do to remedy this, please refer to our **Risk Management Guide** and **Driving Tips** on rsabroker.com/rsa-smart-fleet.



When your drivers have been speeding by more than 20% over the limit, they will receive a notification on their RSA SmartFleet app.

At the same time, you will see a copy of the notification on your Fleet Manager Portal.

Where notifications are triggered, you will see a red bar at the top of your home screen showing how many unread notifications you have received.

Selecting View Notifications will open another screen showing further detail.

Notifications in detail

Notification messages are displayed in descending order from the most recent to the least, with any unread notifications displayed first.

Each notification shows the date and time that it was generated, as well as the vehicle and driver to which it relates.

Unread notifications are highlighted by a red dot. Once the notification has been read (when you leave this screen) the highlight disappears and the notification appears faded.

This allows you to retain a list of read notifications for your records, or for use in driver reviews or disciplinary meetings if required.

Deleting a notification

To permanently delete a notification select the X in the top right hand corner of that notification.

02. HOW TO MAKE CHANGES

Section 2 Editing and removing vehicles



To add, edit or remove a vehicle you will need to access the Fleet Admin screen. There are two ways to access this screen – either by selecting Admin from the top right of any screen, followed by Manage Vehicles and Drivers, or by selecting Manage Vehicles or Manage Drivers from the Home Screen.

This screen will list all of the current vehicles and drivers that have been added to RSA SmartFleet.

Editing an existing vehicle

Select the Edit button for the vehicle that you wish to amend. Editing a vehicle here will only allow you to update the vehicle's nickname – for any other changes you will need to consult your insurance broker.

Section 2 Editing and removing vehicles



Removing an existing vehicle

Select the Remove button for the vehicle you wish to delete. Removing a vehicle here will make that vehicle appear greyed out at the bottom of the vehicle list. The vehicle will not be removed from your cover until this has been agreed with your insurance broker.

Your broker will be made aware that you wish to remove a vehicle from RSA SmartFleet. They may not be able to respond directly (turnaround time could be up to 48 hours). You should therefore contact them as soon as possible to discuss your insurance requirements in detail and arrange any relevant change in premium.





To add a new vehicle, select [Click to add a new vehicle](#) from the Fleet Admin screen.

This will open the Add New Vehicle screen.

Here you will need to provide the new vehicle's Registration, Make, Model, Value and expected Operating Radius. Radius is not compulsory information but is captured for information purposes. If you don't know the Radius then input 0.

Naming vehicles

In addition, you can choose to add a Nickname for the vehicle that you are adding, e.g. a white Ford Transit could be 'White Transit' or 'Steve's Van'. This Nickname will be how the vehicle will appear for pairing on the RSA SmartFleet app, so make sure it is clear which vehicle it is.

Once this information has been added, select Submit. As with vehicle deletions, this will move the vehicle to a Pending state on the Fleet Admin screen.

What happens next?

Your insurance broker will need to accept the change and add it to your insurance policy before cover is considered to be in force. A message will appear to remind you of this once the vehicle is submitted.

Pending vehicles cannot be paired with and will not be tracked.



To add, edit or remove a driver you will need to access the Fleet Admin screen. There are two ways to access this screen – either by selecting [Admin](#) from the top right of any screen, followed by [Manage Vehicles and Drivers](#), or by selecting [Manage Vehicles](#) or [Manage Drivers](#) from the Home Screen.

This screen will list all of the current vehicles and drivers that have been added to RSA SmartFleet.

Editing an existing driver

Select the Edit button for the driver that you wish to amend. Editing a driver here will only allow you to update the driver's Name, Nickname or Email address. Any more detailed changes will need to be advised to your insurance broker. They will be able to make the changes on your behalf and, where necessary, update your insurance policy.

Removing an existing driver

Select the Remove button for the driver you wish to delete. Removing a driver here will remove them completely from RSA SmartFleet. If the driver was a young driver, a driver with convictions or a driver assigned to a restricted vehicle on your insurance, then please also contact your insurance broker to advise them of the change.



To add a new driver, you will need to select **Click to add new driver** from the **Fleet Admin** screen.

This will open the **Add New Driver** screen.

Here you will need to provide the new driver's **Title**, **Forename**, **Surname** and **Email Address**. The **Email Address** must be one that they can access from their smartphone as this is used to deliver the app to them.

Driver Nicknames

In addition, you can choose to add a **Nickname** for the driver you are adding – but remember, whichever **Nickname** you choose will be shown to the driver on their **RSA SmartFleet** app.

Once this information has been added, select **Submit**. Unlike adding vehicles, this will not move the new driver to a **Pending** state on the **Fleet Admin** screen.

What you need to do next

Check your insurance policy to ensure that cover is provided for this driver and contact your insurance broker if they are otherwise excluded or you are not sure.

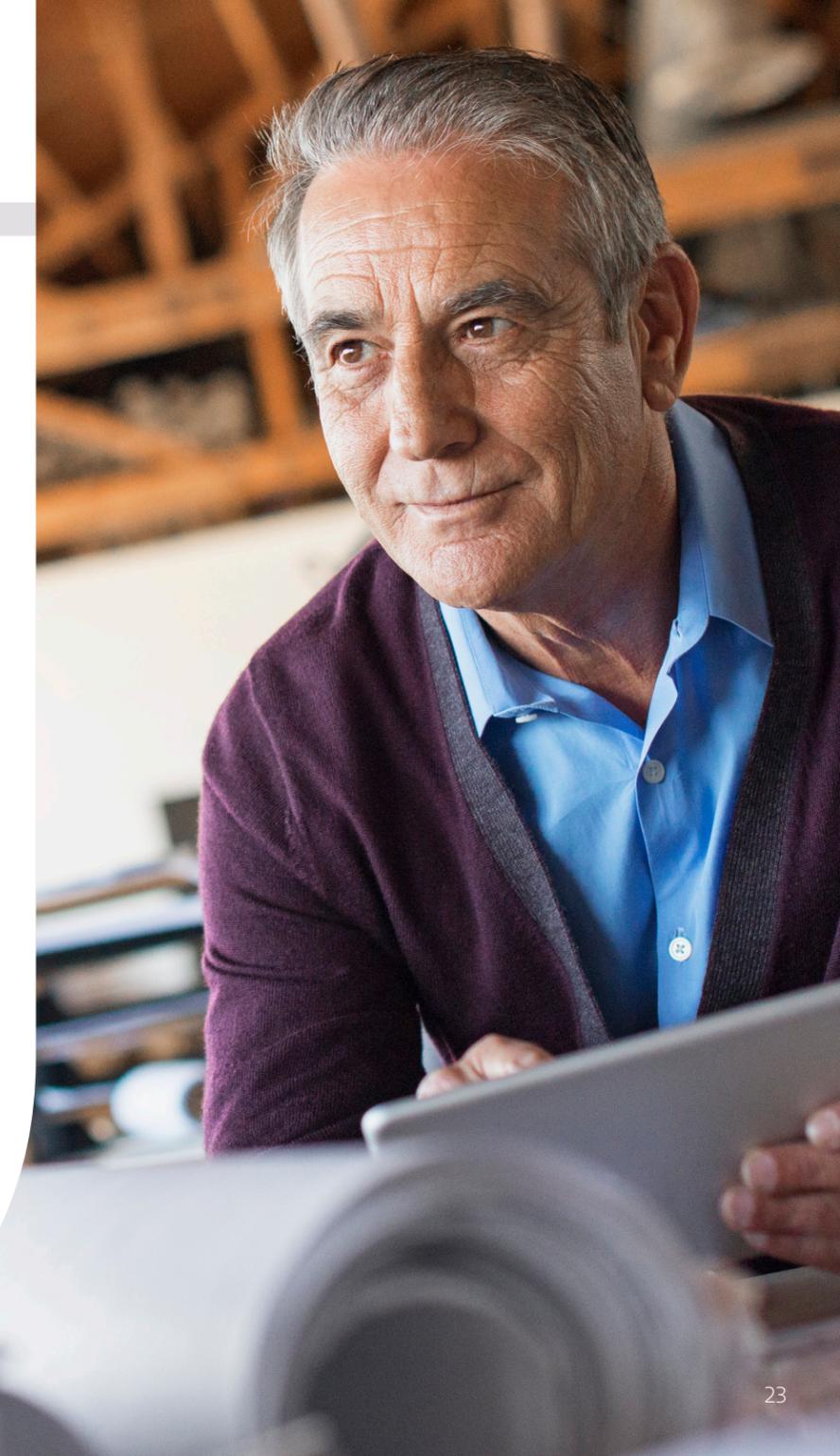
A message will appear to remind you of this upon selecting **Submit**.



Checking new driver details

Once the driver's details have been submitted, they will show on a list, along with all your current vehicles and any other drivers you have added.

If you need to add more, select the **Click to add new driver** button at the bottom of the page. You will need to complete this process for every driver that you want to add.





Section 2 Pairing drivers to vehicles



Checking which drivers are assigned to which vehicles and vice versa is easy.

Simply go to the Home screen and select the appropriate icon – either from the vehicles screen, or from the drivers screen.

This will launch a pop-up that will show you all the vehicles that the selected driver is paired with, or all the drivers that are paired to the selected vehicle.

If you need to link a driver and vehicle that are not currently linked, please refer to our Pairing Drivers to Vehicles Guide on the next page.

Section 2 Pairing drivers to vehicles guide



Step 1

Downloading and installing the app

You now have a list of Drivers and a list of Vehicles – so what happens next? Drivers that you have added will receive an email telling them how to download the SmartFleet app.

If they have not received their email, check that you have the right email address for them and ask them to check their spam or junk email folders.

Once they have received their email they should follow the link provided to the Apple Store if they are iPhone users, or to Google Play if they are Android users, and download the app.

When the app is opened, the driver will be asked to Log in or Register. As this is the first time they will have used the app, they should select Register.

Step 2

Driver registration

To be able to register, drivers will need to enter the following information:

- Their Email Address (the one that you entered for them on your Fleet Manager Portal).
- Their Date of Birth.
- Their Mobile Number.

This information is used to validate their registration and ensure we have the correct driver assigned to the phone and also to prevent others from accessing their data. What the driver enters here will also be used if they ever forget their password.



Step 3

Creating a password

The driver will need to enter a password with at least eight characters, including one capital letter and two numbers.

Logging in

Once this is submitted, they will be asked to submit their email address and password again to log in.

They can click Remember Me to save time when logging on in future.

Step 4

The Home screen

Successful log in will take them to their Home screen. For further information about what they can do from here, see our **Driver User Guide**, available on rsabroker.com/rsa-smart-fleet For now though, we are going to focus on connecting this driver to one of your vehicles. To do so, you need to ask them to press the Pair New Vehicle button in the bottom left hand corner.



Step 5

Pairing with a vehicle

To link a driver to a vehicle, they need to ensure they have Bluetooth enabled on their phone. If not, you will receive a warning message telling you to do so. Most phones allow you to enable or disable Bluetooth through the phone's settings menu.

If you are unsure how to activate Bluetooth on a handset, please refer to the smartphone manufacturer's guide.

On the driver's smartphone

If Bluetooth is active on the phone then pressing Pair New Vehicle will open the Vehicle Selection screen. This will display all vehicles that appear on the Fleet Manager Portal.

In the vehicle

Your driver should choose a vehicle to pair with, then sit in that vehicle, making sure that the Bluetooth device in the vehicle is switched on. For most vehicles/devices, the ignition should be on to provide power to the device.

They will also need to make sure that the Bluetooth device is accessible – some Bluetooth devices have PIN code access and may need the phone to access the device prior to connecting the app.

Only when these steps are complete should they select the vehicle from the list on the screen.



Step 6

Connecting to the right device

Selecting the vehicle from the list on the phone screen will show a list of devices available to connect to. You should ensure that the driver connects to the device associated with the vehicle's Bluetooth and not any other device in order to prevent errors in data collection.

We recommend sitting with the driver while they do this to make sure the process is followed correctly.

Automatic connection

Once they have selected the appropriate device, they should click Pair Vehicle to link their phone to that vehicle.

From then on, anytime they are in this vehicle, the two should pair automatically as long as Bluetooth is enabled and they are logged into the RSA SmartFleet app.

You will need to go through this process for every vehicle and driver that you want to pair together.

Note

Once a driver has already paired with a vehicle, that vehicle will appear greyed out and ticked. This will apply to every vehicle the driver has paired with.



After pairing

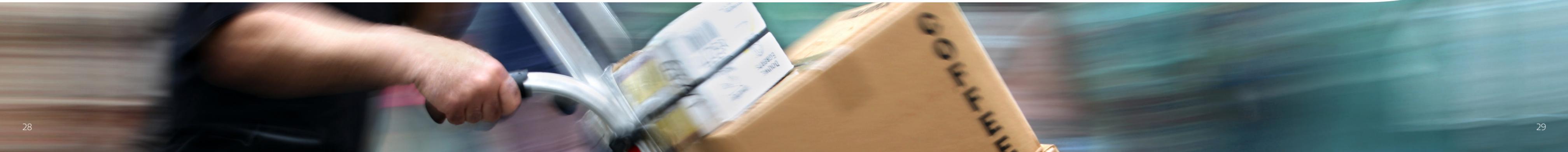
Once all of your vehicles and drivers have paired and are using the app, you will be able to see who is driving which vehicle, how well and how often using your Fleet Manager Portal.

If you want to check which drivers have been paired with which vehicles, then click on the icon next to each driver's name on the Driver View of your Home screen.

Selecting Driver View on your Home screen will bring up a list of all of your vehicles in a pop-up box.

The vehicles that the driver has been paired with will be marked with a tick and those not paired will be marked with a cross.

You are now up and running and ready to collect data.



03. ADMIN

Section 3 Changing your password



To change your password, you will need to enter the Admin screen by selecting Admin in the top right hand corner.

From here you will be given four options:

1. Manage Vehicles.
2. Manage Drivers.
3. Change your Password.
4. Change your Contact Details.

Selecting Change your Password will open a new screen.

You will need to enter and confirm your new password, which must be at least eight characters long and contain at least one capital letter and two numbers.

Section 3 Forgotten password



If you forget your password when trying to access the RSA SmartFleet Fleet Manager Portal, then simply select Forgotten Password? from the Login screen.

This will open a new screen where you will be asked to re-enter your email address for validation.

If the email address is recognised then an email from your broker will be sent to you containing a one-off link to another website where you can reset your password.

If the email address is not recognised then you will see a pop-up message to let you know and you will be asked to try again.

Section 3 Accessing help, Terms & Conditions



For a reminder of any of the Terms & Conditions and for access to additional help guides, risk management information, safer driving tips and more, please visit the **RSA SmartFleet website**.
www.rsabroker.com/rsa-smart-fleet-broker-toolkit