



# ***Self-service Support Portal***

***Version 1.0***

***User Guide***

[www.greenroad.com](http://www.greenroad.com)

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Self-service Support Portal User Guide  
Document Version 1.0  
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## 1. Introduction

GreenRoad is pleased to provide the GreenRoad Self-service Support Portal (SSP) which will allow you to log your technical support cases and view status & progress of your cases at your convenience via the SSP web site.

This is the initial version of the SSP – GreenRoad will continue to develop SSP functionality and will offer an enhanced version later this year. You are encouraged to provide your feedback on the capabilities and usability of the SSP to GreenRoad Support or your GreenRoad account manager so we can better address your needs in the next version.

This user guide describes the capabilities SSP and is intended to help managers make the best use of these capabilities to address their GreenRoad support needs.

The GreenRoad SSP provides the following capabilities:

- ✚ View and search for pre-defined solutions to cases
- ✚ View your case history
- ✚ View the details of your cases
- ✚ Log (create) a new case
- ✚ Update an open case (and communicate with GreenRoad Support personnel)

## 2. Brief Overview of the GreenRoad 360 Service

The GreenRoad 360 service is a comprehensive service designed to help fleets improve driving behavior and driving safety. The service consists of four components:

- **GreenRoad Live™** refers to the GreenRoad in-vehicle experience and equipment. Live detects and analyzes 120 different driving maneuvers and provides automated real-time driver coaching via a non-distracting green / yellow / red LED display, to help improve driving performance.
- **GreenRoad Central™** is the GreenRoad secure web portal for managers and drivers. Central allows drivers to review their trips and driving performance; and enables managers to get insights into driving behavior across their fleet, identify drivers or routes that need attention, and take action to improve and sustain improved driving performance and safety. Note: *Central was previously known as Safety Center.*
- **GreenRoad Engage™** is GreenRoad's customer success program through which GreenRoad partners with its customers to accelerate and sustain safety and fuel improvements by providing proven processes, best practices and metrics.
- **GreenRoad Intersect™** is the partner program and technology integration platform that enables GreenRoad to provide customers a comprehensive, integrated, best-of-breed solution to address their needs beyond driving behavior management and safety, for example, mobile resource management and insurance and risk management solution needs.



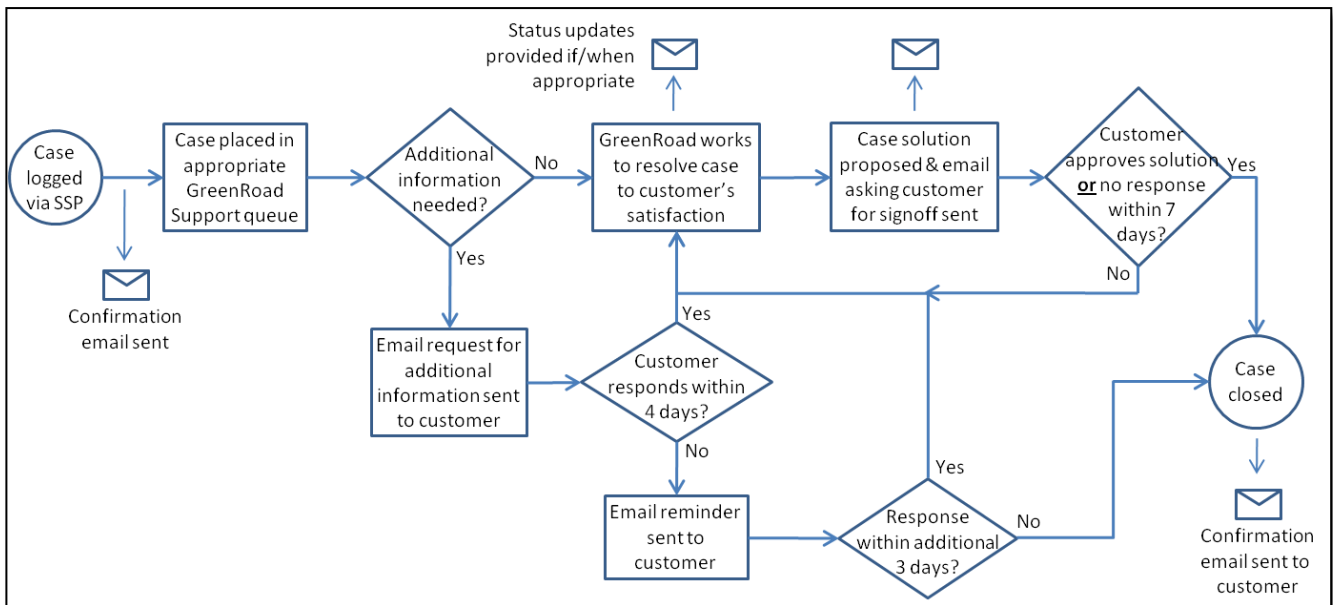
### 3. GreenRoad Support Case Management Process

When you log a case via the SSP, you will receive an email notification confirming the case was logged into the GreenRoad case management system. The case is then placed in the appropriate queue for review and processing by GreenRoad Support. GreenRoad may contact you if additional information is needed to investigate the situation, and once the necessary information is provided, our Support personnel will work to resolve the case.

You can respond to these requests by replying to the email requesting the information, or by adding a comment to the case via the SSP. Please respond to these requests for additional information at your earliest convenience so GreenRoad can process your case without unnecessary delay. GreenRoad will send you a reminder if we do not receive a response from you within 4 days and will close the case on the assumption that it is no longer relevant to you if we do not get a response from you after an additional 3 days.

If the resolution requires multiple actions to be completed or extensive troubleshooting work to be done, GreenRoad will strive to update you on the progress of the case as we work to resolve it. Once a solution is determined, GreenRoad will propose the solution and ask for your confirmation that it satisfies your needs before closing the case. If the proposed solution is not acceptable, GreenRoad will work with you to address the case to your satisfaction. Once the case is closed, you will receive an email confirming this action.

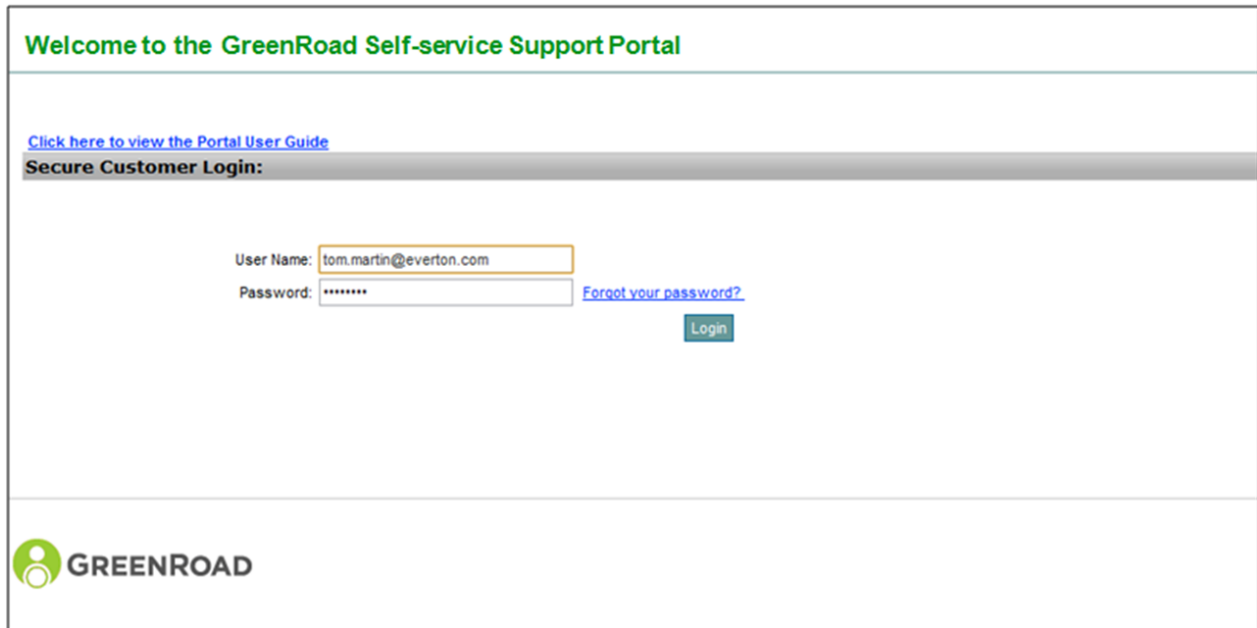
The diagram below provides a visual representation of the case management process.



## 4. Using the Self-service Support Portal

### 4.1. Accessing the SSP

To login to the self-service support portal, please click [here](#) or click on the link in the SSP welcome email you should have received from GreenRoad; then type in your user name and password in the login page (see figure 1), and click on the 'Login' button. Note that your SSP user name and password may be different from the user name and password you use to log in to the GreenRoad site.



Welcome to the GreenRoad Self-service Support Portal

[Click here to view the Portal User Guide](#)

**Secure Customer Login:**

User Name:

Password:  [Forgot your password?](#)




Figure 1: SSP login page

If you do not know your user name or password for the SSP, please send email to [support@greenroad.com](mailto:support@greenroad.com) requesting your SSP user name / password and provide your first name, last name, and company name.

When the full implementation of the SSP is available later this year, you will be able to access it directly from the GreenRoad site and will not need to log in separately.

### 4.2. SSP Home Page

The 'Home' page displays a list of 5 solutions and a list of your open cases as shown in Figure 2 below. Click on a solution or case to view the details of that solutions or case.

Solutions are listed in order of popularity; your open cases are displayed in reverse chronological order based on when the cases were opened.

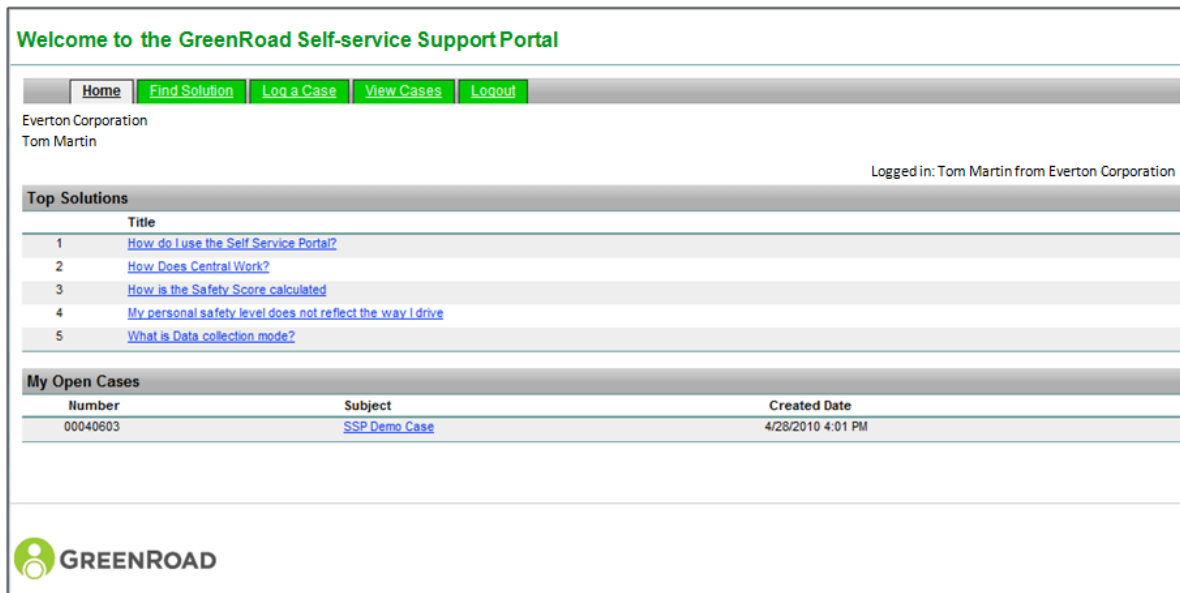


Figure 2: SSP Home page

### 4.3. Find Solution

You can search for solutions in the 'Find Solution' tab of the SSP. Solutions are documents created by GreenRoad that describe how to resolve specific problems or queries. Refer to figure 3 below.

There are two easy ways to search for solutions:

- ✚ Enter the key word relating to your support need into the 'Search for' box. To refine the search, select a sub category and then click on 'Find Solution'.
- ✚ Browse the solution category by pressing the links that are displayed on the screen under 'All Solution' section.

Once you have found your solution you are looking for this can be printed in a hard copy by clicking the **Printable View** button. Related attachments can also be downloaded.

It is advisable to perform a search for a solution before logging a new case, since you may be able to find the solution to your support need without having to contact GreenRoad.

GreenRoad will continue to add solutions over time, and welcomes your suggestions for additional solutions you would like to see included in the SSP. Please submit your suggestions by logging a case and specify 'Feedback' as the case type.

Welcome to the GreenRoad Self-service Support Portal

Home Find Solution Log a Case View Cases Logout

**Find Solution**

Search for:  \*in  Find Solution

**Search Solutions**

Search Results for: "central"  
Search Results in "All Solutions"

[GreenRoad Central](#) (4) [GreenRoad Live](#) (2)  
[Uncategorized](#) (1)

**Search Results in "All Solutions" and Subcategories** \*Sort by:

Score	Solution Title	Related Cases	Last Modified Date
100%	<a href="#">How Does Central Work?</a>	0	12/30/2009
5%	<a href="#">What are the main events the in vehicle unit measures?</a>	0	11/23/2009
5%	<a href="#">What is Data collection mode?</a>	0	12/30/2009
4%	<a href="#">GreenRoad Live</a>	0	12/30/2009
4%	<a href="#">How is the Safety Score calculated</a>	0	12/15/2009

Figure 3: The 'Find Solution' screen

#### 4.4. Log a Case

To log a new case, select the 'Log a Case' tab and fill in the new case form shown in figure 4 below. Please provide as much of the requested information as possible to enable GreenRoad support to service your case more effectively and quickly. Mandatory fields are marked with a red asterisk. After completing the new case form, click on the 'Submit' button to create the case. You will receive an email confirming the case was created.

When the case is created, the case number and details will be displayed on the screen. You can review the case details to confirm the information and add an attachment to the case. The process of adding attachments is described under the 'Updating Open Cases' section below.

Note: Case number(s) should be used in all communications with GreenRoad that are not done via the SSP. This allows GreenRoad Support to more easily find and examine the details of the case(s) referred to in the communications.

Figure 4: The 'Log a Case' screen

#### 4.4.1. New Case Input Fields

**Case Type:** Please select the appropriate case type option from the drop down selection list. The table below explains the case type options.

Type	Explanation
Issue	Select this option when you have an issue with the GreenRoad service or service component and want GreenRoad Support to investigate and address the issue.
Request	Select this option when you want GreenRoad to perform a task not related to a problem with the GreenRoad service or a service component, e.g., install the in-vehicle unit on a vehicle, conduct a training session, etc.
Query	Select this option when you have a question for GreenRoad, e.g., How is the safety score calculated? Etc.
Feedback	Use this option if you want to provide feedback to GreenRoad about any aspect of your experience with the service or interactions with GreenRoad. Note: You may also submit suggestions for how GreenRoad can improve the service using the 'Submit Suggestion' link on the GreenRoad web portal.

**Case sub-type:** Please select the appropriate case sub-type option from the drop down selection list. The table below explains the case sub-type options.

Type	Explanation
Central [web site]	Select this option when the issue, request, query or feedback is related to the overall GreenRoad service or the GreenRoad web portal



Live [In-vehicle equipment or experience]	Select this option when the issue, request, query, or feedback is related to the GreenRoad in-vehicle device or any aspect of the in-vehicle experience
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**Symptom / Component:** *[Optional Input]* this field is used to specify the symptom or component of the GreenRoad service associated with the issue, request, query, or feedback. If applicable, please select the appropriate option from the drop down list.

Symptom / Component	Related to	Explanation
Tampering	Live	Any damage caused to GreenRoad in-vehicle equipment
Dallas probe	Live	Issues related to using the GreenRoad driver identification probe or availability of the probe
Display Flashing	Live	LEDs flashing for no apparent reason
Display not working	Live	Display LEDs are not working when the vehicle is in motion
Live too sensitive	Live	The in-vehicle equipment appears to be over sensitive causing the display LEDs to flash for minor maneuvers and generate red trips for the driver when it should not be doing so
Open/Close display	Live	Request to set display configuration
Unit not working	Live	The in-vehicle unit is not working or not working as expected
Dashboard	Central	When you have a question or a problem with the Dashboard components
Delete trips	Central	Ask to delete trips assigned to drivers
Driver Missing trips	Central	The case where a driver reported he was driving but the trip(s) don't show up in GreenRoad Central
Fleet Management	Central	For any issue related with the fleet management component
Installer Suite	Central	This value is for our installer partners
Login	Central	Reporting any login issues to our GreenRoad Central
Site Performance	Central	Issues related to responsiveness of our website
Reports	Central	Ask for help or raise a problem with the report module
Safety drill down	Central	Relates to features under the Safety drill down menu
Posted speed reports	Central	Relates to posted speed violation reports
User's details	Central	Ask for changes in your drivers details
Vehicle missing trips	Central	The case where a vehicle was on the road you but the trip(s) don't show up in GreenRoad Central

**Severity:** *[Optional Input]* Use this field to indicate your assessment of the severity of the issue. The options are 'Low,' 'Medium,' and 'High.' The default severity level is 'Low.'

Severity	Explanation
Low	Select this value if the issue has a low impact on your operation,

Severity	Explanation
	i.e., you have a workaround for the issue or the issue is not a significant issue for your operations. This is the default severity level.
Medium	Select this value if the issue has a significant impact on your operations, e.g., when an LED display is missing, data from a vehicle is not showing on the web portal application, etc.
High	Select this value if the issue is having a big impact on your operations, e.g., an issue that is impacting many drivers, managers, and/or vehicles.

**Subject:** Provide a brief indication of the reason for creating the case, e.g., ‘Install GreenRoad service for a new vehicle’

**Description:** Provide a detailed description of the issue, request, query, or feedback. Please include any relevant information about the case that is not provided via the other input fields in this form.

**Vehicle Registration Number:** Provide the registration number for the vehicle that is experiencing the problem or that needs a service visit.

**Vehicle Label:** *[Optional Input]* Provide the label used to identify the vehicle that is experiencing the problem or that needs a service visit. If the Vehicle Registration Number is provided, there is no need to also provide the vehicle label.

**Driver Name:** *[Optional Input]* Provide the first name and last name for the driver experiencing the problem.

## 4.5. View Cases

The View Cases page displays the history / list of your cases. The page is displayed when you click the ‘View Cases’ tab or after a case is created. Refer to figure 5 below.

You may view all your cases, only your open cases, or only your closed cases by clicking on the appropriate button on the page.

Click on the subject line of a case to view the case details and add comments or attachments to the case.

After viewing the case details you can return to the list of cases by clicking on the ‘View Cases’ tab.

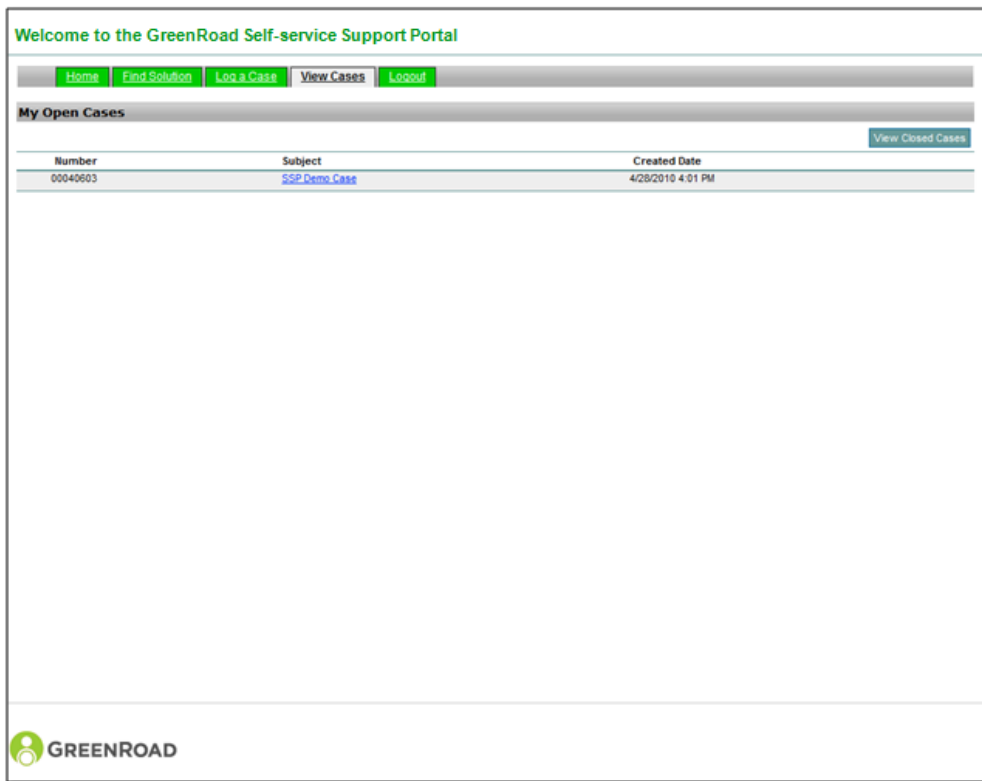


Figure 5: The 'View Cases' page

#### 4.6. Updating Open Cases

The self service portal is designed to allow you not only to log cases but also monitor the progress of them, update the case as new information becomes available, and communicate with GreenRoad Support while the case is being worked on. You can update your open cases and communicate with GreenRoad Support personnel working on your cases by adding comments and/or attachments to the case. Refer to figure 6 below.

To add comments, or attachments to help resolve the case, click on the **Add Comment** button or the **Add Attachment** button and then follow the instructions displayed on the screen.

When you add a comment or attachment to a case, you will receive an email notification confirming the update was made to the case. You will also receive email notifications when the GreenRoad Support personnel working on your case want to communicate with you. When you receive an email notification from GreenRoad Support that requires a response from you, please login to the SSP and provide the response by updating the case with a comment and/or attachment.

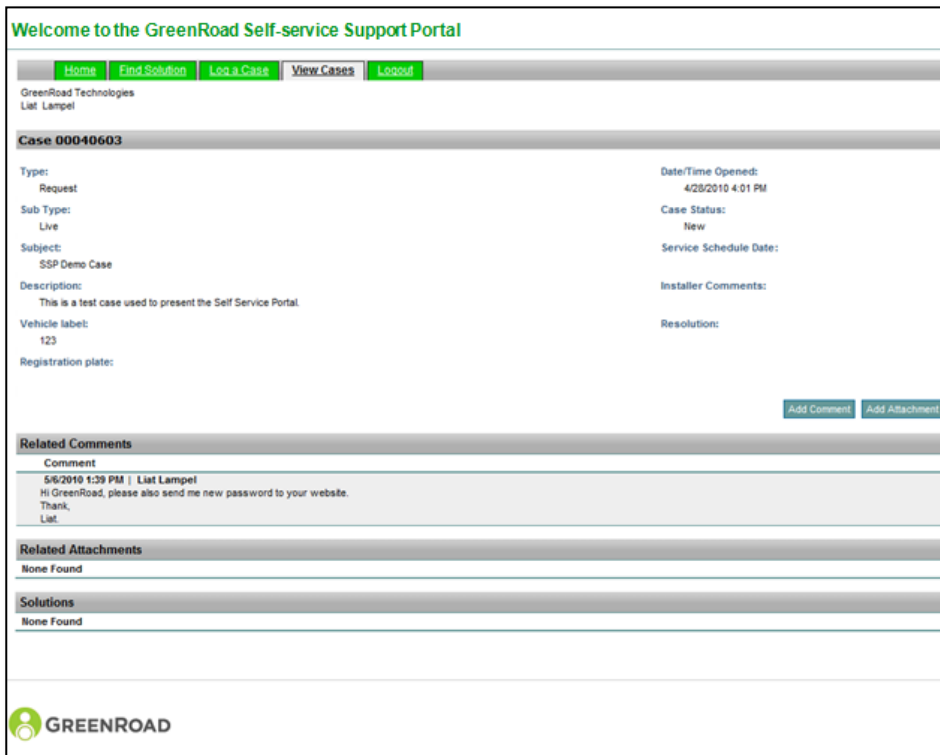


Figure 6: Updating an open case

## 4.7. Logging Out of the System

When you are finished working with the SSP, please logout and close your web browser tab / window.

## 5. Providing Feedback

GreenRoad welcomes your feedback on this document or the GreenRoad SSP, as well as suggestions for improvements you would like to see in the full implementation. Please submit your feedback and suggestions by logging a case, specifying 'Feedback' as the case type.

If you are unable to access the GreenRoad Self-service Support Portal, please send an email to [support@greenroad.com](mailto:support@greenroad.com) and include your first and last name, your company name, and you OU/location name, and any relevant information about the situation that might help GreenRoad more effectively address the situation.

*Please note that only users defined as managers in the GreenRoad service have access to the SSP. Users who are only defined as drivers should contact their managers for assistance with problems, requests, or queries.*

Note also, that all uses (including those defined as drivers in GreenRoad) may provide suggestions for improving the GreenRoad service or any aspect of their GreenRoad experience via the 'Submit Suggestion' link on the GreenRoad web portal application.