

## Toyota I\_Site Fleet Management System

Customer Start-up Guide



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**1 Introduction**

The aim of this guide is to provide you with guidance for how to set up your Toyota I\_Site dashboard and provide a summary for some of the main tasks and features of the site.

A full user manual that details all the functionality and guidelines for the site can be found in the help section within the I\_Site website. We will refer to this for further information throughout this guide. Further information about this user manual and additional help can be found in section 8 of the guide.

**1.1 Accessing the site**

Toyota will automatically set up all new customers as users at the point of order, and send an email with the login details to the main administrator \*. If you have not received your account details, please email [I\\_Site@uk.toyota-industries.eu](mailto:I_Site@uk.toyota-industries.eu)

To access the site go to [www.toyota-isite.eu](http://www.toyota-isite.eu) and enter your 'User name' and 'Password'.

The first time you login, you will be asked to change your password.

*Please note: Login details are case sensitive.*

If you forget your password, select the 'forgot password link' and a generated password will be sent to the e-mail address that is registered for you \*.

(\*) You may have to wait 15 minutes to log-on the first time to allow the system to configure your user profile

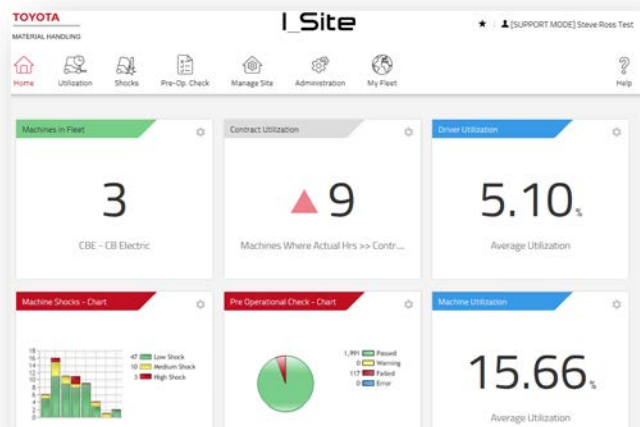


**2 About the site – the main dashboard**

**2.1 Dashboard – smart tiles**

*Refer to section 11.2 of the full user manual*

When you log into the I\_Site website, you will see the main dashboard which features a title bar and up to 9 smart tiles, that can be tailored to your individual needs. These smart tiles provide a flash report about your truck / operation and enable you to drill down for more detail.




**2.2 Modifying the main dashboard – Adding editing and deleting**

*Refer to section 11.3 to 11.7 of the full user manual*

To add a new tile to your dashboard, click on an empty smart tile location (grey box), this will bring up a list of parameters on the left hand side that you can add.

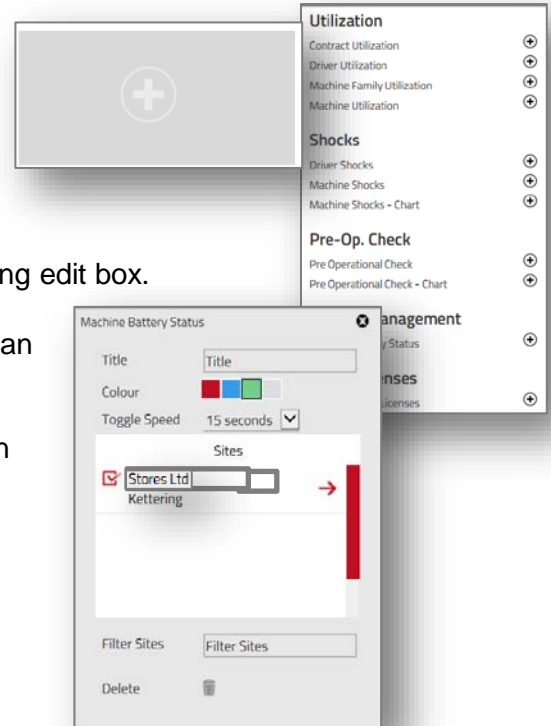
Click on the + next to the parameter you want add it to the dashboard.

To edit a smart tile – you need to click on the cog icon  located in the top right of the tile. This will bring up the following edit box.

From here you can change the title, colour, time span and span and toggle speed.

You can also delete the tile from the dashboard by clicking on the bin icon.


*Please note: Deleting the tile, will only remove it from your dashboard, it will not delete the information.*




**2.3 Main toolbar**

At the top each page is your main tool bar. These provide shortcuts to the main areas of your site and drill down into more information.




- 


**Utilisation**

By site, driver, machine or contracts
- 


**Shocks**

By Driver, machine or shock detail
- 

**Pre-op (Option)**

By driver checklist, driver machine or result
- 

**Manage Site**

Manager your trucks, driver and access
- 

**Administration**

Set up system users

**3 Administration**

*Refer to section 5.1 of the full user manual*

**3.1 Create system user**

As the main administrator, you can set up other members of your team so they can access the site.

**3.1.1 Set up the user**

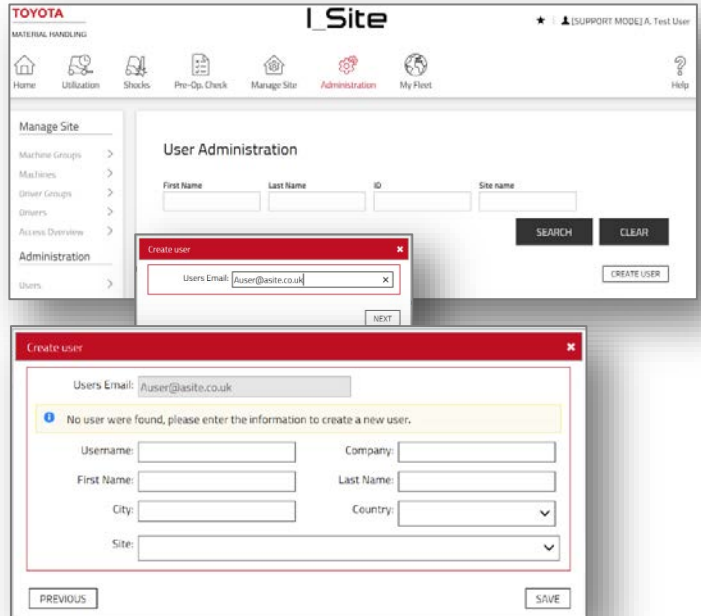
Go to the 'Administration' tab and click Users in the left navigation column.

Click Create user. This will get you to the first dialogue window, asking for the user e-mail address.

Click *Next* for the 'Create user' detail window.


Enter 'User ID' based on "ukis" followed by the first 2 letters of the users first name and first 3 of their last name (i.e. John Smith = ukisjosmi)

Enter data as required and click Next for assigning 'Sites' and 'Roles'.





**3.1.2 Assign sites and roles**


Once you have set up the user you need to assign a site(s).

Click the down arrow  on the 'Sites' bar to view to sites for your operation.

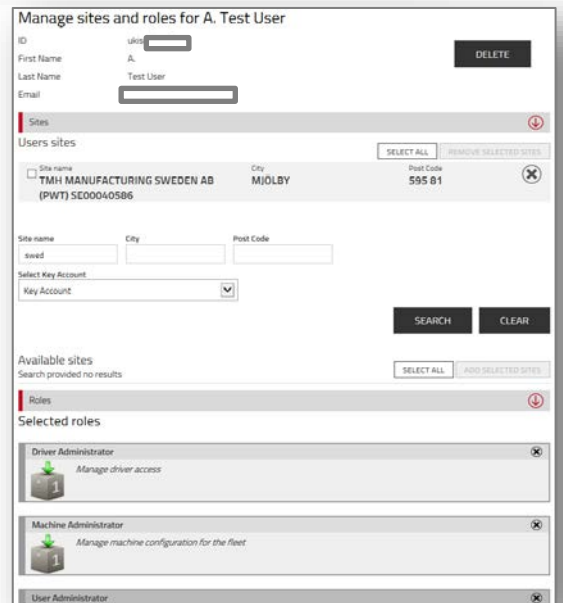
Click the + icon to the right of the site name to add. The selected site(s) will move to the 'Users sites' heading.

To assign roles, click the down arrow  on the 'Roles' bar to view.

The available roles. Mark the role to be selected and click on the 'package plus'  icon. The selected role(s) will move to the 'Selected roles' heading.

Assigned settings are saved automatically. Assigned sites and roles can be removed by means of the delete  icon.

You will be advised by e-mail of the new user you have added, containing 'User ID' and temporary 'Password' – You will then need to forward the information onto the new user together with any additional information that might be useful. Note that it takes the system 15 minutes to configure the new user.



**4 Manage Site**

*Refer to section 5.6.1 of the full user manual*

Click on the manage site icon, this will bring up a list on the left where you can manage the drivers access and machines in your operation. One of the first tasks in the set up process is to add your drivers and give them access to the trucks that they are trained to use.

**4.1 Adding single drivers**

If you only have a small number of drivers or you are adding an additional driver the easiest method is to add drivers manually.

Go to drivers and click on create driver, a window will pop up.

Enter driver name, PIN code (5 digit code)

*Please Note: PIN codes 00000 and 99999 cannot be entered. Creating the PIN codes 01258, 02258 or 03258 should be avoided since they are already stored in the keypad and DHU as default.*

Select 'edit' driving license and enter the drivers license dates for each truck range. This will enable the system to refuse truck access if the operator's license has expired.

Press create driver to get to the 'Driver details' dialogue window.

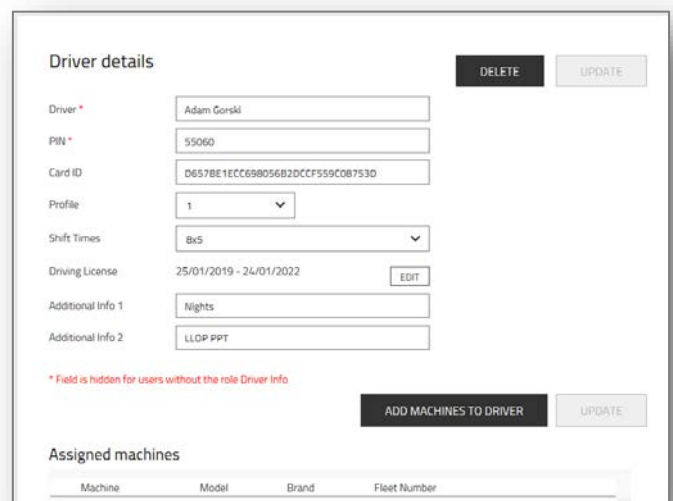
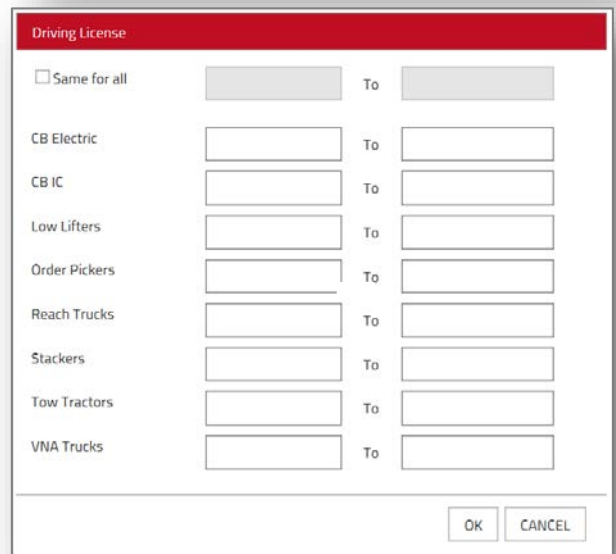
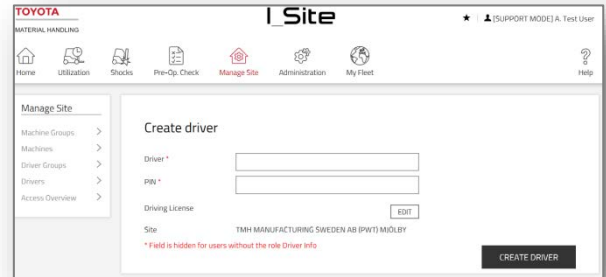
**For Smart Access card ID please refer to section 5.7.1 of the full user manual**

Enter the profile (1 or lockout reset) and shift times (pick the shift pattern that best fits the operators working) and add driver specific information in the additional info fields e.g. department or team.

*Additional tip: To get utilisation calculations as correct as possible, select the maximum number of days the driver is likely to be working, i.e. 7 days even if working weekends only occasionally.*

Press Add machines to driver to allow the driver to be able to use the truck.

*Tip: If creating more drivers at the same time, enter all drivers before adding machines. In that case, click Update and Save in the pop-up window. To add the next driver, click Drivers or use the web return arrow. Drivers may also be uploaded from an Excel template, see next section.*



*Refer to section 5.6.2 of the full user manual*

**4.2 Adding drivers from a template**

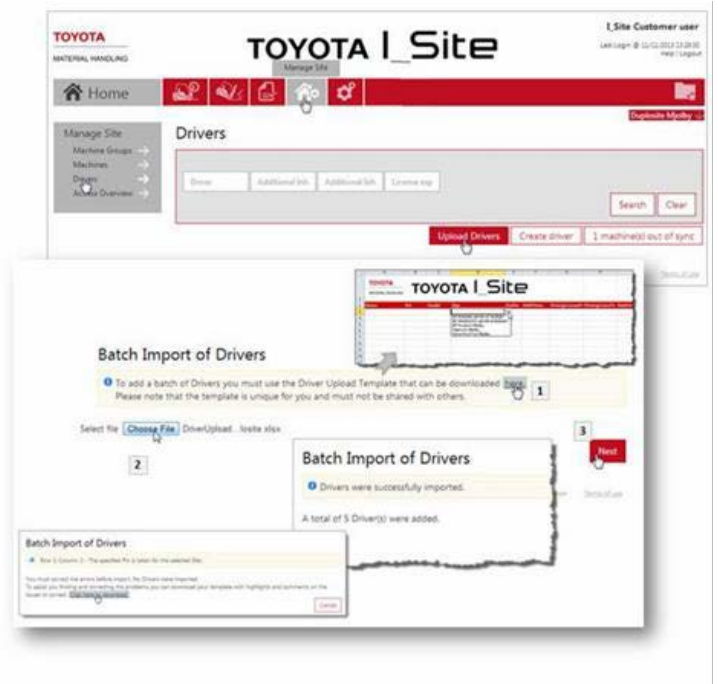
If you have a large number of drivers to add you can upload from an excel spreadsheet.

Go to drivers and click on upload driver. This will get you to dialogue windows for batch upload from an Excel template.

Press the link [here] to get the template. Name the worksheet and save to your computer. Complete the table, using drop-downs as provided and save.

Attach the completed worksheet by selecting 'browse' Choose File and navigate to the file. Click Next.

A pop-up note will confirm successful import. If unsuccessful, an error message will specify incorrect worksheet entries.



Once you have added the driver you will need to go into each driver to add the machines or select the machines under the manage site tab and add drivers

**4.3 Machines**

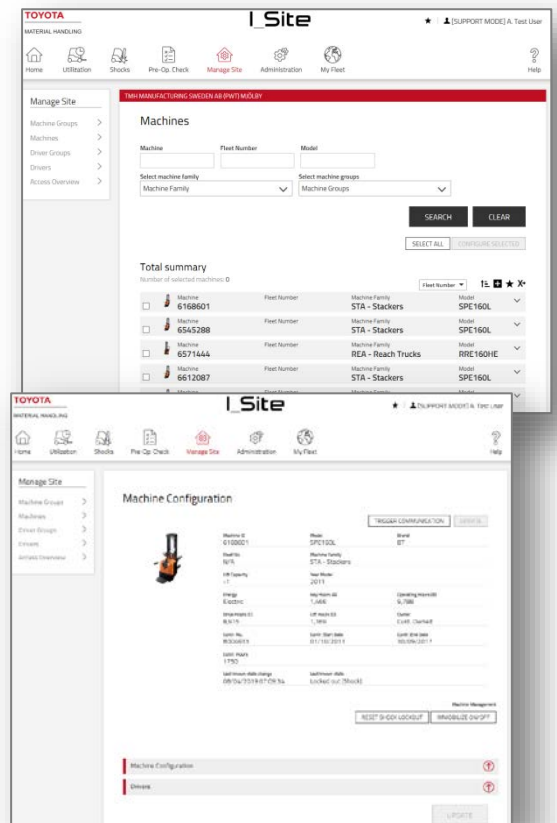
*Refer to section 6 of the full user manual*

Go to the 'Manage Site' tab and click machines in the left navigation column. A list of machines at your site should be displayed.

If no trucks are displayed, do a blank search by leaving all search criteria clear.

The list of trucks and configuration will have been setup by Toyota Material Handling UK, but you can make small adjustments.

By clicking on a machine ID you will see the machine profile page, how each truck is configured and make changes.



**4.3.1 Machine configuration**

The middle column in the configuration table shows the current setting on the machine, while the right hand column can be used to change the configuration.

The main change you are likely to make is in relation to the sensitivity and reporting levels of shock sensors or shift times.

To enter new setting, click on the dialog bar or the icon to the right.

When modifications have been completed, click update. In the confirmation pop-up window, click save for a download when the unit is next scheduled to communicate or click send SMS and save to send the change immediately.

*Refer to section 6.2 of the full user manual*

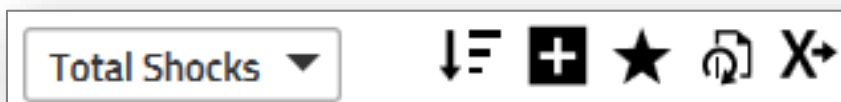
Machine Configuration			
	Recommended	Current Configuration	Desired Configuration
<b>Shocks</b>			
Lockout Enabled		Yes	Yes
X-Threshold	15	20	20
Y-Threshold	15	20	20
Normal Profile Reset		No	No
Normal Profile X Interval		20	21
Normal Profile Y Interval		20	21
Reporting Level Low	10	10 - 14	10 - 14
Reporting Level Medium	15	15 - 19	15 - 19
Reporting Level High	20	20 and above	20 and above
<b>Battery Settings</b>			
Show battery details		Yes	Yes
Machine always uses the same battery		Yes	Yes
Battery size (Ah)		430 Ah	430 Ah
Rapid discharge parameter 1		45 minutes	45 minutes
Rapid discharge parameter 2		30 minutes	30 minutes
Enable BDI notification		No	No
When BDI lower than		20	20
<b>Miscellaneous</b>			
Comm Freq		Every 8 hours, 00:00	Every 8 hours, 00:00
PIN reporting		Yes	Yes
Shift Times		1x8	1x8
<b>Pre-Operational Check</b>			
Enable Pre-Op. Check		Yes, once per 24h, all drivers	Yes, once per 24h, all drivers
Start time		06:30	06:30
Time until Timeout		5 minutes	5 minutes
For Lockout Reset profile		No	No
Randomized questions		Yes	Yes
Checklist		SPE/LPE	SPE/LPE

**5 Shocks**

*Refer to section 6.9 of the full user manual*

When you click on the 'Shocks' tab you can see all reported shocks on your trucks by driver, by machine or a shock overview. You can change the date range to look at a specific period.

The data will show the number of shocks in the period and the number by severity. You will notice this toolbar at the top of your shock list on the right hand side.



Using this tool bar you can filter or sort your list, expand or collapse the detail of the list, plus export the list to excel so you can do some further analysis. Hover over the icons to see what each one does.

The shock overview provides you with additional information about each shock, including the location, time and date, driver, machine and if the truck was locked out.

It is also possible to have e-mail alerts for high shocks

Please remember if your machine is due to be moved off site, the associated collected data will need to be downloaded using the export to Excel facility.



**6 Utilisation**

*Refer to section 6.6 of the full user manual*

When you click on the utilization tab, you can see the utilization by site, driver, machine and contract.

The machine section will give you a better understanding of your truck utilization, but also the run hours and for electric trucks the battery cycle detail.

In this section you will see the symbol below. This allows you to switch from table view to chart view.



**6.1 Battery Status**



When in list view if you see the battery symbol you can click on this to see a graph of your battery BSI data, this will show you when the truck was charged and how it is being used.

If you hover over the points on the graph, small pop-up windows will appear with more data about the driver and how they were operating the truck in terms of key time, run and lift time.

*Refer to section 6.11 of the full user manual*



**6.2 Contract Utilisation**

To get the contract utilisation, click on the Utilisation tab and click on contract. The list will show the contract data for each truck including the contracted hours and Projected Run Hours (Predicted machine usage for the 12 month period).

In each row you will see a traffic light status for: Projected Hrs – Status for contract hours  
Run On – Time left to contract expiration date

The symbol descriptions are to the right, but can also be seen in the site by hovering over the symbol. If symbols are in red, some action may need to be taken. If symbols are in amber you will need to monitor the situation.

*Refer to section 7 of the full user manual*

**Projected Hrs**

- Projected Hrs less than 80 % of the contracted hours
- Projected Hrs between 20% under and 10% over the contracted hours
- ▲ Projected Hrs between 10% and 20% over the contracted hours
- ▲ Projected Hrs more than 20% over the contracted hours

**Run On**

- Contract ends in more than 90 days
- ▲ Contract ends in between 30 and 90 days
- ▲ Contract ends in less than 30 days, or has already ended

**7 Pre-Op Checks (Option)**

Refer to section 9 of the full user manual

The pre-op check option will only show in the main toolbar if you have chosen to have pre-operator checks at point of order

In this area you can set up your checklist with the questions that you want your driver to answers before they can start to operate the truck, but also see the results of any pre-op checklists.

**7.1 Setting up a checklist**

Click on checklist and then 'new checklist'. Give the checklist a name, select the site from the drop down menu and click on create.

You will then get a new window where you can start to enter the safety control questions. The question can be structured for both positive or negative answers. Enter the question and click 'add'.

For example:

- Is the battery fully charged?*
- Are the brakes faulty?*
- Are you satisfied that the truck is safe to use?*
- Is the horn faulty?*
- Does the steering function correctly?*
- Is the general condition of the truck ok?*
- Does the truck have an oil leak?*

The system allows you to add up to 20 questions.

Once you add questions you can also choose whether or not that question is critical by clicking on the shield symbol. The default for all questions is non critical.

**Critical** - Symbol is red

If answer to a critical question is not the expected answer, the truck will shut down and report as a fail until resolved

**Non-critical** - Symbol is grey

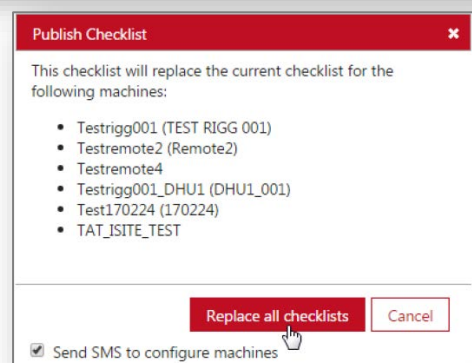
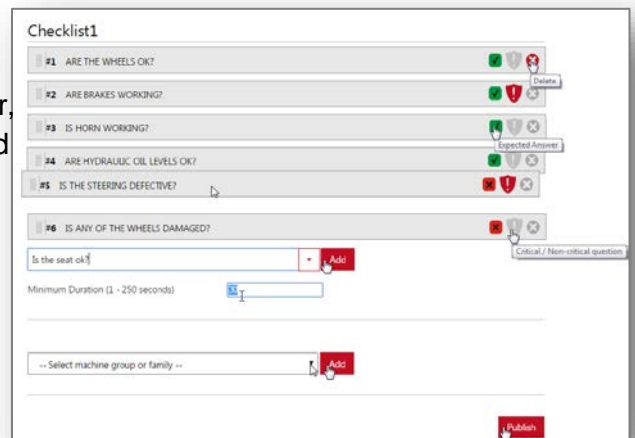
If answer to a non-critical question is not the expected answer, the trucks will report a warning in the system

After you have added the questions, you will need to choose a machine group e.g. Reach trucks to add the checklist to.

Once you have completed the pre-op check list, click on publish.

Click on the checkbox for Send SMS to configure the machines. If left blank the checklist will be downloaded at the next scheduled communication.

E-mail alerts can be setup for checklist failures



## 8 Additional help

In addition to the start-up guide, we have developed a number of resources to help you get the most out of I\_Site.

For more help on setting up your I\_Site web portal or accessing the information, log into the site and click on the help link in the top right hand corner of the site. You will need to login to the system to access. Here you will find the full user manual and a link to E-learning enrolment that will guide you through the site and answer some frequently asked questions.

If you still feel like you want more one-to-one support, Toyota can offer an additional training and support service. To discuss your training requirements, obtain a quotation or ask a general question please email [I\\_Site@uk.toyota-industries.eu](mailto:I_Site@uk.toyota-industries.eu)