

TOYOTA

MATERIAL HANDLING

Toyota I_Site – Getting the most out of I_Site.

What data should you be viewing?



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TOYOTA

MATERIAL HANDLING

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1. Introduction – Getting the most out of I_Site.

This guide will highlight the main area's you should monitor within I_Site to get the most out of the system.

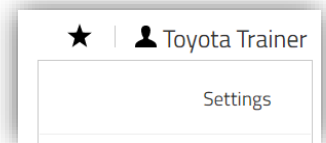
The I_Site system if used correctly can help you **identify areas for improvement** and **increase performance and productivity** on-site.

This guide will show you some key tips for accessing the data and how to investigate it further.

2. I_Site Alerts and Notifications.

You have two methods of receiving notifications from I_Site, **Email notifications** from the I_Site Portal or **Push Notifications** from the I_Site Mobile App.

In the I_Site Portal you can **enable email notifications** by clicking on your name in the top right-hand corner and clicking settings. Under the **Notifications section** on the left side menu, you can choose to enable the following notifications.



General – Set the email address to receive notifications.

Geofence – Enable Geofence notifications from the Map Functionality. (See section 14 of the I_Site User Manual for Geofence setup).

Pre-Op Check – Enable Pre-Op Check notifications for Failed Pre-Op Checklists.

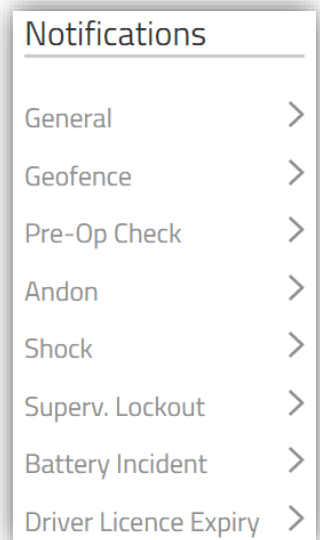
Andon – Enable Andon Notifications from the Andon Functionality. (See section 12 of the I_Site User Manual for Andon setup).

Shock – Enable Shock Notifications for High Level Shocks.

Supervisor Lockout – Enable Supervisor Lockout Notifications if used to Lockout a truck.

Battery Incident – Enable Battery Notifications – Enable BDI Notification needs to be set to Yes. (See section 6.2.2 of the I_Site User Manual for Battery Settings).

Driver License Expiry – Enable License Expiry Notifications for 1 week, 1 month or 3 months for drivers with expiring licenses.



Each Notification section will have selectable options like shown below.

To **enable the notification tick the enable box** and click update.

A screenshot of the "Notifications - Pre-Op check failure" settings page. It features a checked checkbox for "Enable Pre-Op check failure notification". Below this are four dropdown menus: "Sites" (1 selected), "Driver Groups" (All Driver Groups), "Owner type" (All Owner Types), and "Machine Groups" (All Machine Groups). An "UPDATE" button is located at the bottom right.

If you have access to more than one site you can use the **Sites dropdown** menu to **select all sites** or just an **individual site to receive notifications** from. If you choose a site this will also enable you to **filter by Driver or Machine groups** if you have any setup on that site.

This can allow you to filter down notifications from certain groups of drivers or machines.

If you have multiple shifts working on your site, we **recommend creating a driver group** for each shift this would **allow your shift supervisor to filter down notifications** just for their team members they are responsible for monitoring.

Notifications - Pre-Op check failure

Enable Pre-Op check failure notification

Sites: 1 selected

Owner type: All Owner Types

Driver Groups: 1 selected

Machine Groups: LEICESTER WAREHOUSE LEICESTER, I_Site Team, Leic Training Area, Night Shift

UPDATE

If you select a **machine or driver group**, you will only **receive a notification** if the driver or machine is a member of the group you have selected.

Notifications - Pre-Op check failure

Enable Pre-Op check failure notification

Sites: 1 selected

Owner type: All Owner Types

Driver Groups: 1 selected

Machine Groups: All Machine Groups

UPDATE

If you select both a Driver and Machine group the driver would need to be in the driver group and on a machine in the machine group. If the member is not part of either of the groups, you will not receive any notifications.

We would **recommend filtering by either Driver group or Machine group** and not both at the same time.

For more details on setting up **Driver Groups** see **section 5.6.1 of the I_Site User Manual**.

For more details on setting up **Machine Groups** see **section 6.3 of the I_Site User Manual**.

For details on setting up **Notifications in the I_Site Mobile App** please see the **"I_Site Mobile App - User Manual"** which covers how to enable notifications for the I_Site Mobile app.

3. Viewing Pre-op Checklist Results.

You can view the pre-op results via the I_Site Portal or the last 24 hours of results via the I_Site Mobile app.

Within the I_Site portal you have three ways to look at the pre-op check results.

Summary by Drivers/Machines or all **Pre-Op Checklist Results** for your site.

The Summary pages are useful for identifying if you are having more failures on certain machines or by certain drivers.

If you **click on the results** on one of the rows it will take you in to the **Pre-Op Check Results** page and **filter the results by the driver or machine** you clicked on in the list of results.

Pre-Op Check->Drivers – Will show you a **Total Summary of Pre-Op Checks** Performed, Failed, Warnings and Passed results by each **Driver**.

Driver	Performed	Failed	Warning	Passed
N/A	17	13	0	4
N/A	10	9	1	0

Pre-Op Check->Machines – Will show you a **Total Summary of Pre-Op Checks** Performed, Failed, Warnings and Passed results by each **Machine**.

Machine	Fleet Number	Performed	Failed	Warning	Passed	Technical Error
8FBE16T-12341	CB12	20	8	3	9	0
6547507	OP04	20	5	1	14	0

Pre-Op Check->Results – Will show you the pre-op check results and details with the newest event always showing at the top.

Each page will have options to allow you to **filter the information** you want to display and a from and to date range field to allow you to choose what data range you want to view.

By default it will show you the last 7 days of results for failed and completed.

To view different results use the **Select Status** and **Select Result** drop down menu to filter the results, you can also tick the **Include Reset Information** to display the reset information.

Machine: Fleet Number: From Date: 09/05/2022 To Date: 16/05/2022

Select Driver Groups: Select Machine Groups:

Select Status: Warning, Failed Select Result: Session too short

Include Reset Information


SEARCH CLEAR


Once you have **selected the information** you want to display you can **click search** and it will show

you all the results for the selected options during the date range chosen.


 **Warnings** are **none critical question** which have been **answered incorrectly**.

Warnings will not produce a lockout on the system or send email notifications and will need to be monitored via the I_Site portal.


Title	Machine	Registered	Fleet Number
 CB V4	8FBE16T-13345	16/05/2022 15:41:42	CB36
Failed Questions			
→ Is there any visable damage to the exterior of the CB?			

 **Failed results** can be caused by **1 of 3 different ways, completed, session too short or timed out**.


Failed / Completed – A **Critical question** was **answered incorrectly**.

Title	Machine	Registered	Fleet Number
 CB V4	8FBE16T-12345	16/05/2022 11:51:09	CB14
Failed Questions			
→ Is the beacon working?			

Failed / Session too short – Driver completed checklist quicker than the **“minimum duration”** setting which is **set on each checklist**.


Title	Machine	Registered	Fleet Number
 LLOP & PLP V2	6558752	16/05/2022 14:36:27	PLP02
Result: Session too short			



Failed / Timed out – Checklist timed out due to inactivity and reaching **“time until timeout”** setting which is **set on the machine configuration page** for each truck.

Title	Machine	Registered	Fleet Number
 CB V4	8FBE16T-12316	16/05/2022 11:46:18	CB18
Result: Time out			

A **Failed pre-op check will produce a lockout** on the machine and **will require to be reset** by a **Lockout Reset profile** to put the truck back in to normal state.

If you have **Pre-op Checklist Notifications enabled** you will **receive an email notification** every time you have a **failed pre-op check**.

 If the **lockout on the truck has already been reset** the **reset information** will be shown on the line below the lockout, this will show you where, when and by who the truck was reset by.

 CB V4	Machine	Registered	Fleet Number
	8FBE16T-12316	16/05/2022 11:46:18	CB18
 Reset from Machine	Machine	Date	Reset by
	8FBE16T-12316	16/05/2022 11:52:23	N/A

The **reset from information** will explain which method was used to reset the truck.

Machine = The truck was reset using a Lockout Reset profile on the machine itself.

Web = The truck was reset from the I_Site Web Portal, by a user with access to Machine Administrator and Immobilizer roles.

App = The truck was reset using the mobile app by a user with Immobilizer role.

If **no reset information** is shown below the event the truck will still be **currently locked out** and will require to be investigated and reset by a user with the Lockout Reset Profile to put the truck back in to an active state.

This can also be **reset via the I_Site portal and Mobile app** depending on what level of access your users have been granted.

4. Viewing Shock Details.

You can view all the shock information via the I_Site Portal or the last 24 hours of Red Level Shocks via the I_Site Mobile app.

Within the I_Site portal you have three ways to look at the shock results.

Summary by Drivers, Machines or all **Shock Details** for your site.

The Summary pages are useful for identifying if you are having more shocks on certain machines or by certain drivers.

If you click on the results on one of the rows it will take you in to the **Shock Details** page and filter the **results by the driver or machine** you clicked on in the list of results.

Shocks->Drivers – Will show you a **Total Summary of Shocks** by Total, High, Medium, Low, Lockouts and Operation Time per shock by **each driver** .

Driver	Total	High	Medium	Low	Lockouts	Op. Time / Hi Shocks
N/A	17	1	8	8	1	11:44
N/A	15	0	10	5	0	17:46

Shocks->Machines – Will show you a **Total Summary of Shocks** by Total, High, Medium, Low and Totals from **each machine**.

Machine	Fleet Number	Total	High	Medium	Low	Lockouts	Op. Time / Hi Shocks
6546359	OP08	57	0	30	27	0	44:26
6545268	OP02	36	0	23	13	0	25:07

Shocks->Shock Details – Will show you every shock that has happened on site across the date range selected.

You can select the **Shock Type** to filter between **High, Medium and Low shocks**.

You can select **Category** to filter shocks by **Shock Comment Categories**.

You can select **Damage** to filter shocks by **Damage Comment Categories**.

The “**Lockouts**” tickbox will just show you **shocks which have produced a lockout**.

The “**Include Reset Information**” tickbox will **display the supervisors name who reset the truck** after the shock lockout.

The “**Missing Comments**” tickbox will **display only shocks which haven’t had a comment added** to it.

The screenshot shows a search form titled "Shock Details". It includes input fields for "Machine", "Fleet Number", "Driver", and "Additional Info 1". Below these are "Additional Info 2", "From Date" (with a date picker set to 24/08/2022), and "To Date" (with a date picker set to 31/08/2022). There are three dropdown menus: "Select Shock Type(s)" (set to "Shock Level"), "Select Category" (set to "Category"), and "Select Damage" (set to "Damage"). At the bottom, there are three checkboxes: "Lockouts", "Missing Comments", and "Include Reset Information". Two buttons, "SEARCH" and "CLEAR", are located at the bottom right.

Once you have selected your search options click the search button to display all the shocks for the date range selected.

The newest event will always be displayed at the top of the page by default.

The screenshot shows the "Shock Details" page after a search. The search form is filled with "Machine", "Fleet Number", "Additional Info 1", "Additional Info 2", "From Date" (02/06/2022), and "To Date" (09/06/2022). The dropdowns are the same as in the previous screenshot. Below the search form is a "Total Summary" section with the text "Total Shocks: 768 High: 1 Medium: 1 Low: 766". To the right of this text are a "Shock Level" dropdown and several icons (list, plus, star, refresh, close). Below the summary is a table of search results:

Severity Icon	Date	Driver ID	Machine	X	Y	Comment	Actions
	06/06/2022 18:37:06	N/A	8FBE16T-16381	19	43		
	06/06/2022 20:57:18	N/A	8FBE16T-16381	17	8		
	09/06/2022 13:00:54	N/A	8FBE16T-16381	2	1		








The shocks will be colour coded depending on the severity of the shock based off the machine shock reporting levels.


High level shocks will be shown in **Red**, **Medium level shocks** will be shown in **Orange** and **Low level shocks** will be shown in **Green**.

If trucks are set to lockout for shocks, any **shocks which have exceeded the shock thresholds will produce a lockout** and this will be displayed with a **padlock icon** next to the severity icon.

		Date 30/08/2022 10:55:19	Driver ID N/A	Machine 8FBE16T-12339	X 25	Y 15	Comment 		
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If you select the “**Include Reset Information**” option and search again, this will show you the reset information if the truck has already been reset.

		Date 30/08/2022 10:55:19	Driver ID N/A	Machine 8FBE16T-12339	X 25	Y 15	Comment 		
		Date 30/08/2022 11:04:05	Reset by N/A	Machine 8FBE16T-12339			Reset from Machine		

 If the lockout on the truck has already been reset the reset information will be shown on the line below the lockout, this will show you where, when and by who the truck was reset by.

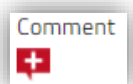
The reset from information will explain which method was used to reset the truck.

Machine = The truck was **reset using a Lockout Reset profile** on the machine.

Web = The truck was **reset from the I_Site Web Portal**, by a user with access to Machine Administrator and Remote Shock Lockout Reset roles.

App = The truck was **reset using the mobile app** by a user with Remote Shock Lockout Reset role.

Each shock has a **comment section** where we can record what happened during the shock, if you are the supervisor who reset the truck we want you to fill in a comment explaining what had caused the shock.



If you **click on the comment icon** this will open up the **comment box** to allow you to add a comment against the shock.

You have a **text box** where you can put in a explanation as to what the driver was doing at the time of the shock.

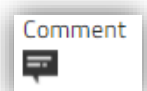
Category can be used to select what type of incident occurred.

Damage can be used to select what type of damage occurred.

If the comments are being completed for each shock this will allow you to **highlight any continuous issues and area's for improvements**.

For example if you look at all the shock comments and find you have had lots of lockouts due to the pot hole in the yard, this would be the justification to the business to repair the pot hole to stop all the wasted time of trucks locking out, supervisors having to go reset the truck or damage to product falling off the pallet when going through the pot hole.

Once a **comment has been added** to the shock the comment icon will turn black indicating a comment has been recorded against the shock.



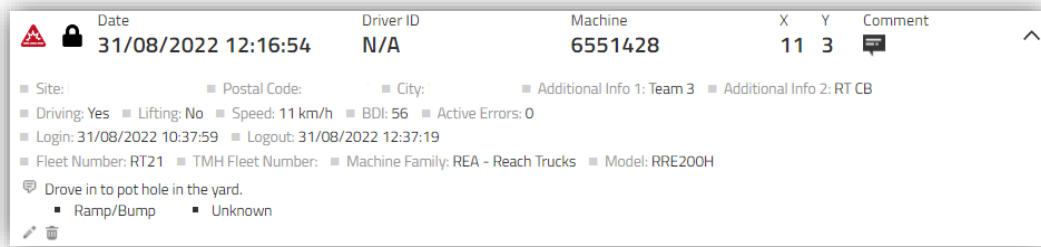
If all supervisors are completing comments after they have completed their shock investigation this can be a way of tracking if investigations have been completed or not.

You could then use the “**Missing Comments**” option to display all shocks without a comment added to them which would produce a list of supervisors who haven't been completing the comments after they have completed the shock investigation.

Each **high level shock** also contains **additional information** on to what the truck was doing at the time of the shock.

This can be **viewed by clicking on the down arrow** at the end of each shock event.

Or you can use the **+ icon** underneath the search button to expand all additional information against all shock events with one click.



With the **additional information** expanded you will be able to **see if the truck was driving, lifting and what speed** the truck was doing at the time of the shock.

In this example you can see the **high shock** occurred while the truck was **driving at 11km/h**.

Driving: Yes | Lifting: No | Speed: 11 km/h

If **high speeds are recorded on the shock** the first recommendation would be to **ask the driver to slow down** to try and avoid creating a high shock.

For example if you was driving over a speed bump at high speeds this would create a higher shock, if you drove over the same speed bump at a slower speed this would produce a lower shock.

If you have **highlighted certain area's which will create a high shock at high speeds** we **recommend installing slow down signs** to indicate to your drivers to slow down while going through the area.

This will **allow you to set shock settings lower to then investigate more shocks**, instead of allowing drivers to drive over bumps at full speed.

Driving: Yes | Lifting: Yes | Speed: 1 km/h

If **driving and lifting are both showing as Yes** this would indicate the driver was driving and lifting at the same time during the shock.

Drivers should be completing these actions separately to ensure they are concentrating on a single action.

If you are driving and lifting at the same time this will increase the chance of you hitting something if you do not have the correct clearance.

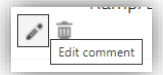
Drivers should be driving up to what they need to load on to, lifting the forks and checking they have the correct clearance, driving forward and lowering the pallet, lifting the forks and driving back out.

If drivers are doing these actions separately they should never hit anything if they have the correct clearance first, if drivers haven't got enough clearance and drive forward they will clip something with the forks or pallet.

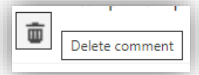
If you are viewing the **additional information** before doing the **shock investigation** this will give you a **good idea as to what the driver was doing** when the truck produced the shock.

If you **compare the additional information with the comments from the supervisor**, this will help you make **recommendations to improve driving habits** on site.

If you need to **edit the comment** you can click on the edit icon underneath the comment to open up the edit comment window.



If you want to **delete the comment** you can click on the delete icon underneath to remove the comment from the shock.



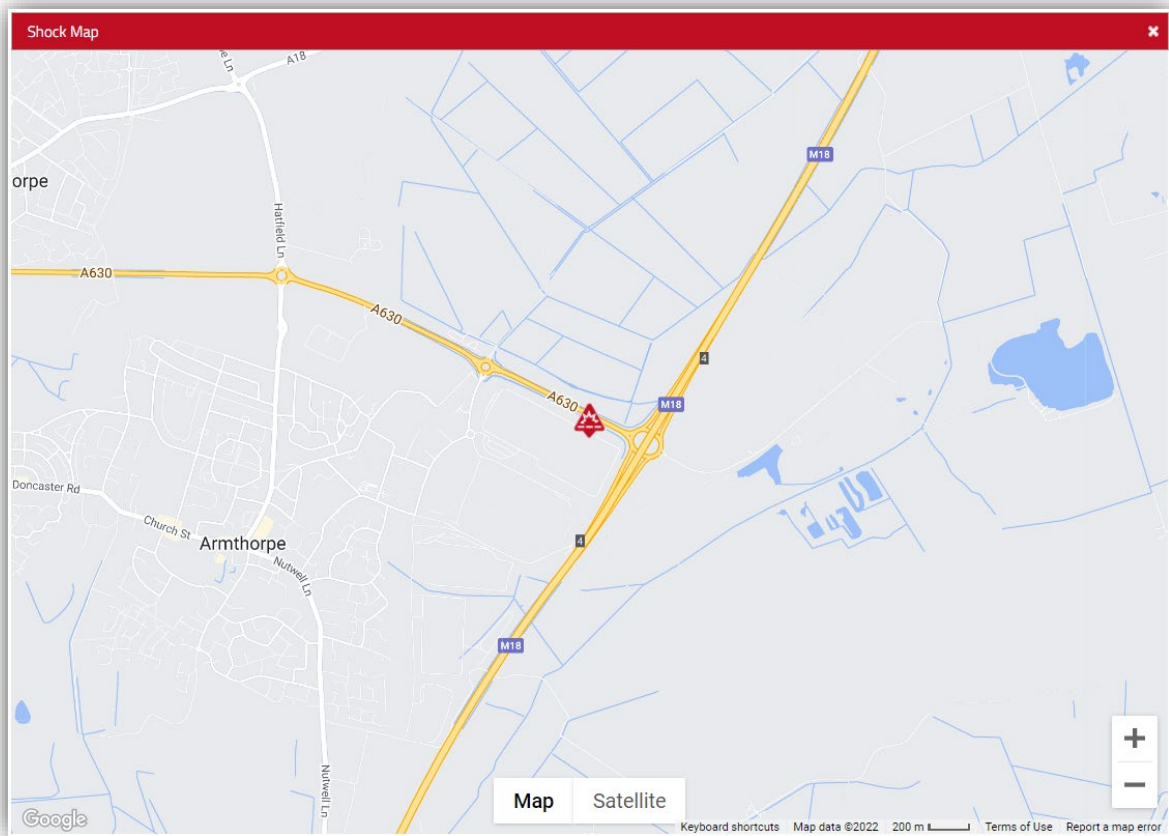
If trucks have the **GNSS Positioning** option enabled on the machine configuration page a **GPRS icon** will also be shown on the right side of the shock details.



If you click on this icon it will open google maps and **display the shock on the map** for you.

If you have CCTV on site this can help identify which camera's to check for footage to help investigate the incident.

This can also help **identify areas where you might be receiving a lot of shocks** due to rough floor conditions or to help locate where damaged infrastructure might of been caused on site.





Please note our **GNSS Positioning feature is for Outdoor Positioning only**, functionality might vary depending on the signal strength inside your building.

If poor signal the system will not be able to triangulate the position of the truck from the mobile network and might show your truck location incorrectly.

5. Monitoring Battery Usage.

To view the **Battery Details** for each machine go to **Utilisation->Machines** section and click search to display a list of all trucks.

 Machine 6841800	Fleet No.	Operating Time 55:48	Utilization 30.33%	High Shocks 0	BSI 	▼
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Clicking on the **BSI symbol** here will take you through to the **battery details** page where you can view the **charging cycles** of the truck and it's usage.

Depending on what type of battery you have on your truck the BSI symbol will appear slightly different.

If you have a **Lead Acid battery** the BSI column will display this icon.



If you have a **Li-Ion battery** the BSI column will display this icon.



The colour of the icon will indicate if they have been any issues with the battery during the last week of usage.

For more details on the colour coding please refer to the **"I_Site User Manual" section 6.11 Battery Reports.**

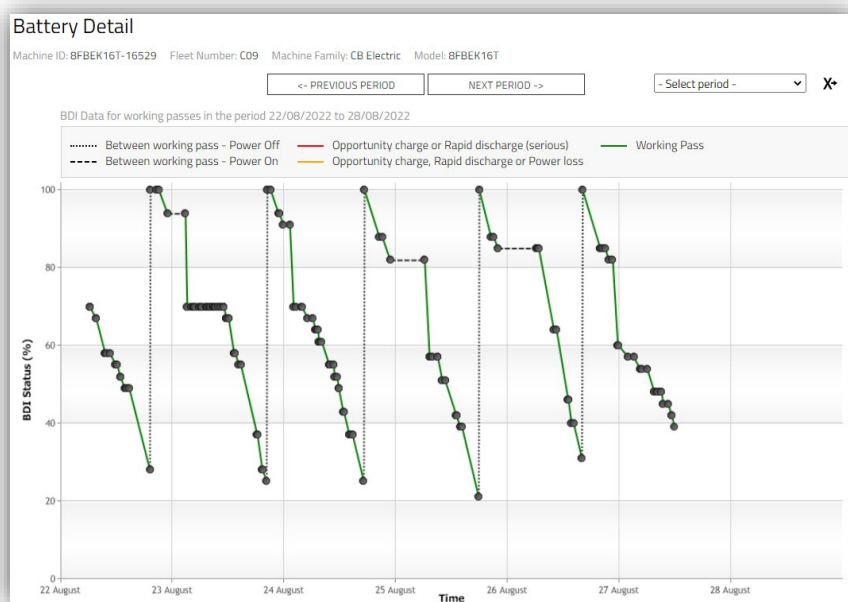
If you click on the **BSI icon** this will take you through to the **Battery Details** page where it will show you the charging history and driver working passes for the machine.

By default it will load the current weeks data, you can change the period of data to be shown by clicking on the previous period, next period or by using the **select period drop down menu.**

<- PREVIOUS PERIOD	NEXT PERIOD ->	- Select period - ▼
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The below example is for a **Lead Acid battery** and displays the total percentage of the battery on the left axis and the date along the bottom axis.

This allows you to see how much battery you are consuming on the truck per day and **ensure you are utilising as much of the battery as possible.**



For **Lead acid batteries** you want to utilise as much of the battery as possible for each charging cycle, you should be using as much of the battery as possible to **optimise your charging cycles**. The less you charge a battery will increase the life span of the battery, every time the battery is discharged and recharged this is classed as a **charging cycle**.

Most battery manufactures will offer a **1500 hour life span for a battery**, if you are charging the battery every day this will quickly eat in to the life span of the battery.

On the above example you can see the truck is being charged at 20% battery capacity, you could of used the truck until it was showing 10% battery before putting the truck on charge.

In the example you have charged the truck 5 times between 20-25% capacity, if you had used the battery until 10% this could of given you an extra 50-75% of battery to use over 5 days.

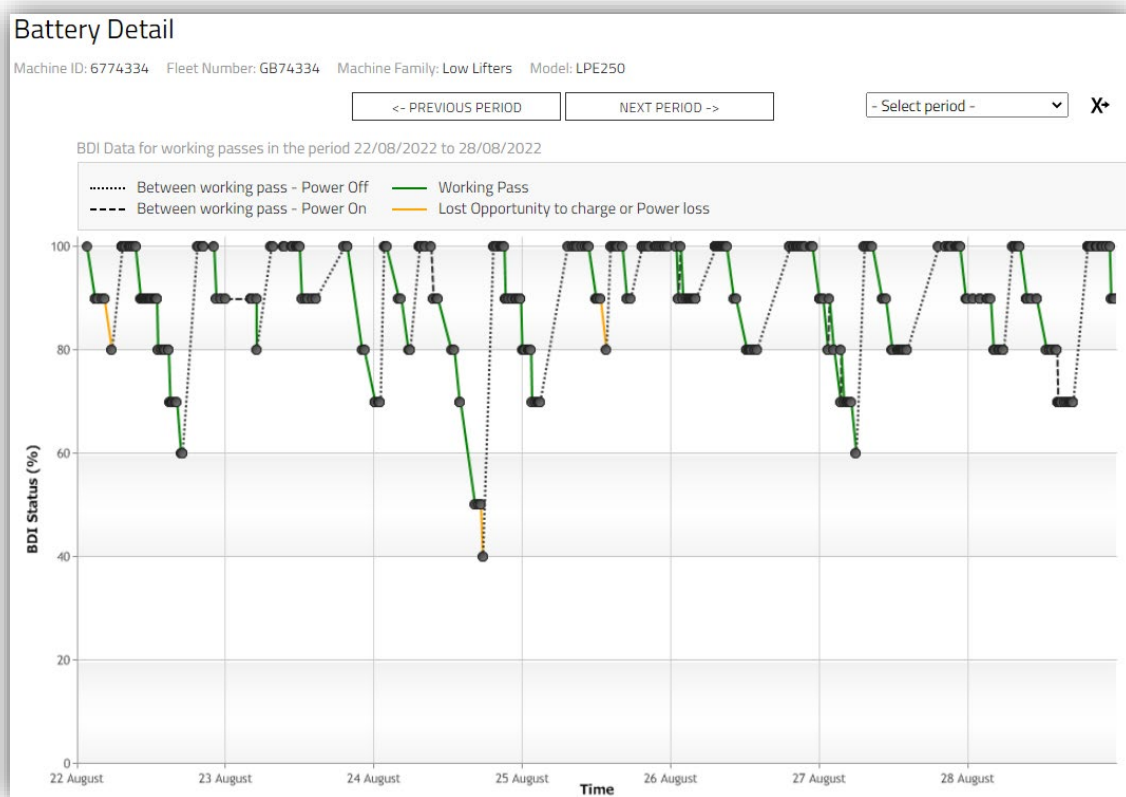
If you can **utilise more of the battery**, this will **decrease the ammount of charging cycles** performed on the truck **increasing the life span of the battery**.

So to **get the most life span out of the battery** you would want to charge the truck fully, use the truck until 10% and then recharge the battery fully before using the truck again.

If for example you only use 20% battery each day, this would allow you to use the truck for 4 days before having to charge the truck which would be 1 **charging cycles**.

If you used 20% battery per day and charged the truck every night, this would have been 4 charging cycles instead of 1.

The below example is for a **Li-Ion battery** and displays the total percentage of the battery on the left axis and the date along the bottom axis.

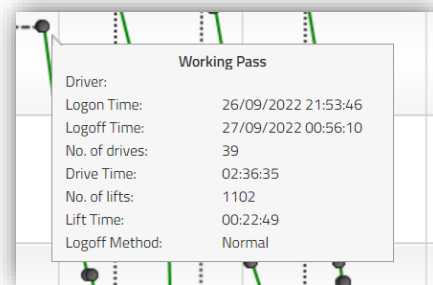


For **Li-Ion batteries** you want to **opportunity charge** the truck whenever the truck is not in use, trying to keep the battery as full as possible inbetween usage.

Ideally you wouldn't want to see trucks fall below 50% capacity and should try and keep them topped up above the 50% capacity if opportunity charging the truck correctly.

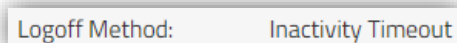
If a Li-ion battery is drained completely this can damage the battery, so you need to ensure the battery is being charged frequently to avoid causing damage to the battery.

When looking at the **Battery Details** chart each time the truck is used a black dot will be displayed on the chart, if you hover over the black dot this will display the **Working Pass Information** regarding the drivers usage of the truck.



Working Pass	
Driver:	
Logon Time:	26/09/2022 21:53:46
Logoff Time:	27/09/2022 00:56:10
No. of drives:	39
Drive Time:	02:36:35
No. of lifts:	1102
Lift Time:	00:22:49
Logoff Method:	Normal

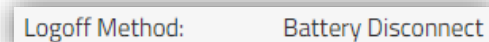
The **Drivers name will be displayed** along with the **time he logged on and off** the truck. It will show you **how many times the drive and lift was used** and total times for both of these actions. It will also **display the logoff method**, if the truck was **logged off correctly** this will be shown as **normal**.



Logoff Method:	Inactivity Timeout
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It could show "**Inactivity Timeout**" which would mean the **driver left the truck unattended** and after 10 minutes of inactivity the truck has turned itself off (10 minutes is the default inactivity setting, this can only be adjusted by a Toyota Engineer if required).

We would **recommend to leave the inactivity timeout** as default, but instead **educate drivers** to ensure they are **pressing the red button to logoff the truck** whenever they go away from the truck and are **no longer using it**.



Logoff Method:	Battery Disconnect
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It could show "**Battery Disconnect**" which would mean the **truck wasn't powered down when the battery was disconnected** to put the truck on charge.

For **Lead Acid batteries** this would indicate the driver had parked the truck up, **didn't press the red button to power down the truck** but instead **disconnected the battery connector** while the truck was **still powered on**.

If you have **charging batteries these will be producing flammable gases** and if you are **disconnecting a live battery** this could **potentially cause a spark** which **could cause an explosion**. You need to **ensure drivers are pressing the red button** to power the truck down **before disconnecting the battery**.

For **Li-Ion batteries** you might see **battery disconnects** showing if drivers are **not powering the truck down** before **removing the charging port cover**, removing the charging port cover will cut the power to the truck producing a battery disconnect.

If drivers can **ensure they are pressing the red button** to power the truck down **before the remove the charging port** cover to connect the charging cable.

Please note CBIC trucks (Counter Balance Internal Combustion) with **drivers who haven't logged off** the truck **before turning off the ignition** of the truck will produce a **Battery Disconnect** error even though the truck doesn't have a battery.

If drivers can **press the red button to logoff before turning off the ignition key** this will show the **logoff method as normal** and prevent displaying incorrect battery disconnect messages.

You can also **investigate Inactivity Timeouts** and **Battery Disconnects** by using the **Driver or Machine Activity** report which is covered in **Section 7 Viewing Driver/Machine Activity**.

6. Managing Contract Hours.

To help you manage your contract hours on your trucks you can view projected hours based off the current truck usage.

In the I_Site portal go to **Utilisation->Contract** and click on the search button to display all of your current I_Site trucks.

This will display all **LTR trucks you have on agreement** with us, it will display your **contract number** and the **contract hours** for each truck.

It will also display some **projected hours based off the past usage** of the truck up until the end of the contract year.

Contr. No.	Machine	Contr. Hours	Projected Hrs	Utilization	Devia...	Run On
B066191	6654903	100	667	667.00 %	▲	●
B082261	8FBEK16T-15844	1000	1166	116.63 %	▲	●
B066191	8FBEK16T-13004	1000	987	98.70 %	●	●

If you expand the **additional info** under each row you will see the **contract start and end dates**. The **projected hours** are based off the usage recorded since the From Date to the current date of the year.

Contr. No.	Machine	Contr. Hours	Projected Hrs	Utilization	Devia...	Run On
B066191	6654903	100	667	667.00 %	▲	●
<ul style="list-style-type: none"> Site From Date: 11/11/2019 To Date: 10/11/2025 Fleet Number: LG3629 TMH Fleet Number: GB92287 Machine Family: STA - Stackers Model: SPE200D Brand: Toyota Year Model: 2019 						

For example if you had done 100 hours in the first month of the contract, it will project you will continue to do 100 hours every month for the remaining 11 months of the contract.

The **Utilisation column** will show you the **total percentage of contract hours you have used**.

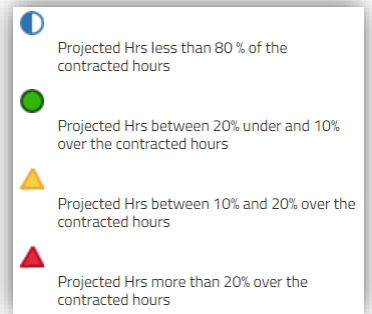
The **Deviation column** will display a different colour icon to indicate if you are under, over or on target with your contract hours.

If trucks are showing the **Blue icon** you are under utilising the truck compared to your actual contracted hours.

If trucks are showing the **Green icon** your trucks are on track with your contracted hours.

If trucks are showing the **Orange icon** you are between 10-20% over your contracted hours.

If trucks are showing the **Red icon** you are 20% over your contracted hours.



If trucks are going over the contract hours you might receive a **excess hours charge** at the end of the contract.

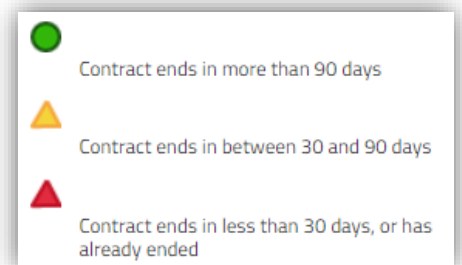
If you can **balance out your hours** on your trucks by **swapping busy trucks with trucks in quieter areas**, this will help you **avoid going over your contracted hours** and avoid any excess hour charges.

The **Run On** column will **indicate how close you are to the contract end dates**.

If trucks are showing the **green icon** you have **over 90 days remaining** on the contract.

If trucks are showing the **orange icon** this means your contract is **due to end in 30-90 days**.

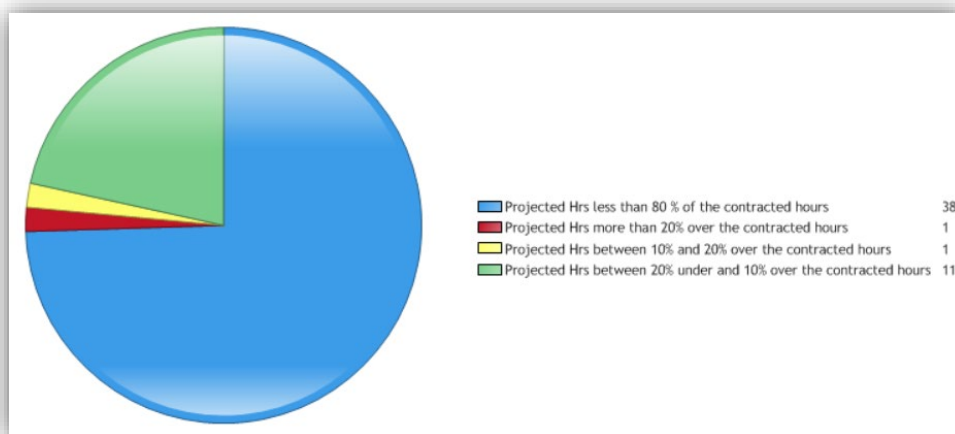
If trucks are showing the **red icon** your contract is due to **end in less than 30 days or has already ended**.



You can also **convert the information in to chart view** by clicking on the icon next to Total Summary at the top of the results page.



This will **convert the Contract Utilisation data** into a **Pie Chart format for easy viewing**.



If you have lots of blue you might need to decrease your contract hours or if you have lots of red you might need to increase them.

Tracking your contract hours can help you ensure you have the trucks on the right contract agreements for their usage and to ensure the trucks are being serviced frequently keeping them in optimal condition.



You can then switch back to List View by clicking on the icon near the Chart title.

7. Viewing Driver/Machine Activity.

To view the current activity of drivers operating the trucks within the I_Site Portal go to **Utilisation->Driver** and click on search to display all driver activity.



Driver	From time	To time	Key Time	Drive Time:	Lift Time:	Op. Time	Op. Ratio
	15:08	15:28	00:20:10	00:02:52	00:00:57	00:03:07	15%
	14:15	14:24	00:08:22	00:08:01	00:00:15	00:08:08	97%
	14:08	14:31	00:22:59	00:00:00	00:00:00	00:07:11	31%

This will display the total activity for the drivers working pass, so when they logged on to the truck until when they logged off the truck.

Key Time displays the total time the truck was powered on.

Drive Time displays the total time the truck was being driven.

Lift Time displays the total amount of time the truck was lifting up or down.

Op Time displays the total time the truck was in operation.

Op Ratio indicates the total operation time compared to the key time.

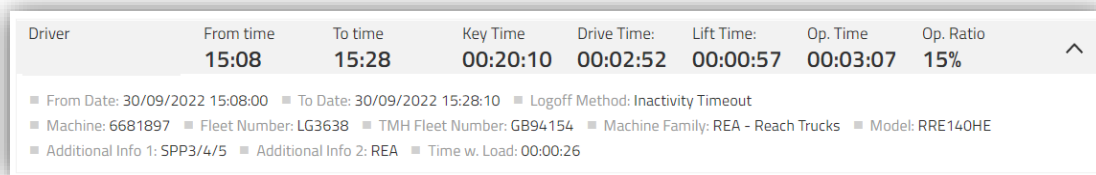
The **higher the operation ratio the more efficient** your driver has been using the truck.

If the operation ratio is low this would indicate the truck has been powered on but not actually in operation which would mean you are **consuming energy on the truck but not using it**.

If you **expand the additional info** for the row you will get more details for the working pass.

If you have a really low **Op Ratio** it could be an indication the driver didn't logoff the truck and left it unattended and after 10 minutes the truck could of timed out from inactivity timeout.

This will be displayed under the **Logoff Method** within the additional info as shown below.



Driver	From time	To time	Key Time	Drive Time:	Lift Time:	Op. Time	Op. Ratio
	15:08	15:28	00:20:10	00:02:52	00:00:57	00:03:07	15%
From Date: 30/09/2022 15:08:00 To Date: 30/09/2022 15:28:10 Logoff Method: Inactivity Timeout							
Machine: 6681897 Fleet Number: LG3638 TMH Fleet Number: GB94154 Machine Family: REA - Reach Trucks Model: RRE140HE							
Additional Info 1: SPP3/4/5 Additional Info 2: REA Time w. Load: 00:00:26							

If you are noticing **Inactivity timeouts** re-educate your drivers to press the red button whenever they have finished using the equipment, this will power the truck down and stop the truck from consuming energy when not in use.

If for example you have 100 drivers leaving trucks to timeout from inactivity, this would be a total of 1000 minutes (16.5 hours) of inactivity.

If you can **reduce the key time on the trucks** to be as close to operation time as possible by turning off the truck when you are not using it, you can make **massive savings in energy costs**.

The less energy you consume while using the truck the less you will need to charge the battery.

Not only will this reduce your energy consumption but this will also **increase the lifespan of your battery**, the less you charge the battery the longer it will last.

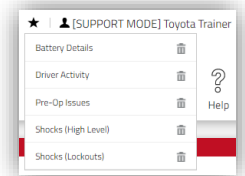
If you are noticing **Battery Disconnects** while viewing the **Driver/Machine Activity** results this is due to drivers not correctly logging off the equipment before powering down the machine. If you can re-educate your drivers on the correct logoff procedure this will stop both **Inactivity Timeouts** and **Battery Disconnects** from occurring and show the logoff method as Normal.

Both the **Driver/Machine Activity** reports can be **extracted in to excel** if required to help investigate the data further, having the data in excel format could allow someone to create pivot tables or graphs to highlight your performance. Please see **Section 9 Extracting Excel Reports** for more details on how to extract excel reports.

8. Creating Favorite Search Result Shortcuts.

Within the I_Site Portal you have the ability to **create favourite shortcuts**. You can use these to **quickly access a certain area of the website** or to **perform a search with predefined options** for **quick access to data** you want to view regularly.

In the top right corner near your name is where the **favourites** are saved, you can **view them by clicking on the star icon** next to your name. To **remove a saved favourite** you can **click on the bin icon** to delete it.



Below is some **recommended favourites** to setup to allow you quick access to area's you might need to access on a regular basis.

User Creation – We recommend to setup this favourite to quickly access the area where you can manage your system users.

Go to **Administration-> Users**

Leave the **search settings as default** then **click search**, this will provide you a **list of all users** who are currently setup on the system.

Click on the Star Icon underneath the search button this will then allow you to **give the favourite a custom name**.



Enter the name you would like to save the favourite as and **click save**.

This will then **add the Favourite to your menu** at the top near your name.

From here you can quickly **setup a new user** by clicking on the **Create User** icon to go to the user creation page.



To quickly **view what roles users have assigned** to their **user account** click on the **+** icon to **list all the roles underneath each user**.

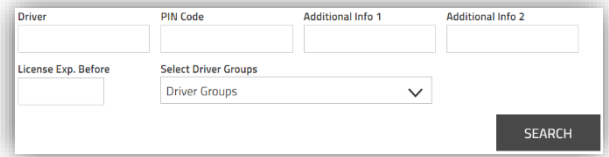


You can also **check for inactive users** by using the **“Not Logged On Since”** field to select a date, **click search** and this will **show you all users who haven't logged in** since the date selected.

Driver Creation – We recommend to setup this favourite to quickly access the area where you can manage your drivers on the system.

Go to **Manage Site->Drivers**

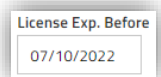
Leave the **search settings as default** and **click search** and save this as a favourite, this will provide you a **list of all drivers** who are currently setup on the system.



From here you can quickly **setup a new Driver** by clicking on the **Create Driver** icon to go to the Driver creation page.



Quickly **check if any licenses have expired** by entering today's date in the **license expired before field** and click search to **display any drivers with expired license**.



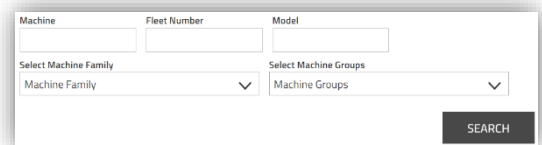
To view the drivers current **Shift Times, Card ID** and **License dates** you can click on the **+ icon** to view these **additional details**.



Machine Last updated – We recommend to setup this favourite to quickly access the area where you can review truck usage and check when it last updated.

Go to **Manage Site->Machines**

Leave the **search settings as default** then **click search** and **save this as a favourite**.



To view the **machine shift times, total key time/operation time usage** and **machine last updated** click on the **+ icon** to expand the **additional info**.



Shift times is the shift pattern the truck is available during the week, this is used for calculating truck utilization of the truck.

The **total hours the truck has been in operation** will be **broken down in to 4 separate actions**. If **high key time compared to operating time** this can indicate **low utilization of the trucks**, try **ensure drivers are powering down the truck** when not in operation to **reduce energy consumption**.

Drive and lift hours are recorded as separate operations unless the driver is driving and lifting at the same time.

Drivers shouldn't be driving and lifting at the same time instead they **should do these operations separately**.

To **identify if you have a lot of driving and lifting** together you can **compare your drive and lift hours** against your **total operation hours**.

Add your drive and lift hours together and **subtract the operating hours**, the difference between these figures is the **total time drivers have been driving and lifting together**.

If this figure is high we would recommend to **re-educate drivers about driving and lifting** separately while using the trucks.

If drivers are driving and lifting at the same time they are **not concentrating on a single action**, this will **increase their chances of causing a incident**.

The **last updated** section will **display a date/time stamp** of when the **machine last updated** with the server.

This date/time can help **identify if a truck has downloaded the latest settings** from the server to the truck.

If for example you've **applied new settings or drivers** to the truck at 15:02, if you have a **newer time stamp** then when you applied the settings this is **confirmation the truck has updated** with the latest settings or drivers.

Last Updated: 10/10/2022 15:03:51

If you notice the **Last Updated date is not updating**, please **contact the I_Site Support team** so we can check on the communication history of the truck.

Pre-Op Issues – We recommend to setup this favourite to quickly access the area where you can view any warnings or failed pre-op results.

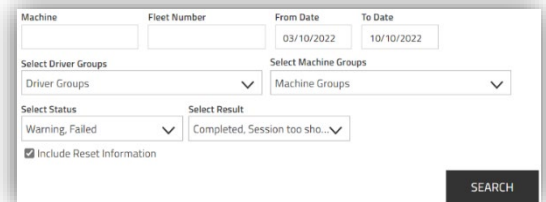
Go to **Pre-Op. Checks->Results**

In the **search settings** select the following options.

Under **Status** select **Warning and Failed**.

Under **Result** select **Completed, Session too short and Timed out**.

Select the **"Include Reset Information"** option then **click search** and **save this as a favourite**.



This search will display all **Pre-Op Results which include Warnings or have Failed**.

It's **important to monitor these results** as these are pre-op checks which drivers have provided the **incorrect answer** to your checklist question **or not completed** the checklist correctly.

To **view the details of the results**, click on the **+ icon** to view the **additional information**.



This will display you the **Result, Total Duration** spent completing the checklist, the **drivers name** and a **list of the warnings or failed questions**.

If you are **viewing this information before you go to investigate the incident** this will give you a good understanding as to **why the driver has failed the pre-op check** and allow you to only check the things which have been **reported as an issue on the truck**.

If the **truck is faulty** and requires a engineer, you can **raise a breakdown** for the truck using the **I_Site mobile app service request** feature.

If the **truck isn't faulty** and the **driver just made a mistake**, once you have **completed your investigation** and **checked the truck is safe to use**.

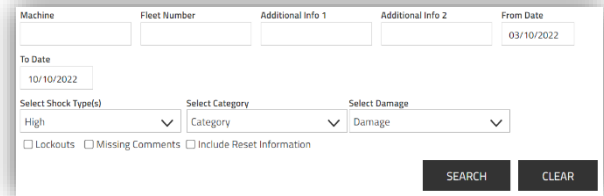
You can then **reset the truck** back to **normal state** and put the **truck back in to operation**.

Shocks (High Level) – We recommend to setup this favourite to quickly access the area where you can view High Shocks which have been recorded.

Go to **Shocks->Shock Details**

In the **search settings** select the following **options**.

Under **Select Shock Type** select **High** then **click search** and **save this as a favourite**.



This search will display all the **high-level shocks recorded on all machines by all drivers**.

To **view what the driver was doing at the time of shock** you can click on the **+ icon** to view the **additional details**.



This will tell you if the driver was **driving, lifting** and **what speed the truck was traveling at** when the shock occurred.

We recommend to setup this favourite **before you have enabled Shock Lockouts**.

This will allow you to **review how many high shocks** you might have on the trucks **before enabling lockouts**.

Any **high level shocks** recorded would **produce a lockout if shock lockout is enabled**.

If you **have too many high shocks** you would want to **increase the shock settings** to create less high shocks so **you can investigate them**.

If too many shocks this could affect productivity on site and supervisors will have too many shocks to investigate.

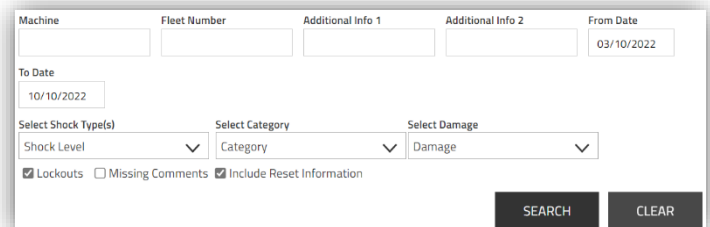
You want to **focus on your worst shocks** to start off **allowing your supervisors to complete the investigations** and then start to **decrease the shock levels as your drivers improve on site**.

Shocks (Lockouts) – We recommend to setup this favourite to quickly access the area where you can view shock lockouts and the reset information which have been recorded.

Go to **Shocks->Details**

In the **search settings** select the following **options**.

Select the **“Lockouts”** and **“Include Reset Information”** options then **click search** and **save this as a favourite**.



This search will show you **all shocks which have produced a lockout** and **display the reset information** if the truck has already been reset.

If you have multiple shifts on site it's **important to check if any trucks are currently locked out** and have not been reset.

Having this favourite setup will allow you to **quickly identify if trucks have been reset** or are still **awaiting to be investigated**.

When a **supervisor has investigated a shock** you want them to **fill in a comment** with some **details explaining what had happened** with the truck and **if any damage has occurred** on the truck or infrastructure on site.

To help **you identify which supervisors have not completed the comments for a shock lockout** you can **select the “Missing Comments”** option and **click search**, this will **display you shocks which your supervisors haven't investigated** and added a comment against yet.

If all **supervisors are completing the comment after investigating the shock** this will give you **full traceability** as to **which shocks have been investigated and which ones haven't** yet by your supervisors.

It's **important you collect the comments** for each shock to **highlight area's for improvement** on site.

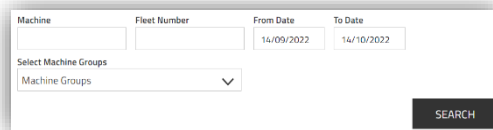
For example if you have had **10 lockouts due to the pot hole** outside the warehouse door.

If you **fix the pot hole** that would **reduce the shocks** on the trucks, **increase driver performance**, **reduce the time required by supervisors** investigating the shocks and **improve productivity** on site and **reduce damage costs**.

Battery Details – We recommend to setup this favourite to quickly access the area where you can view Battery Details to check if drivers are charging batteries correctly.

Go to **Utilisation->Machines**

Leave the **search settings as default** then **click search** and **save this as a favourite**.



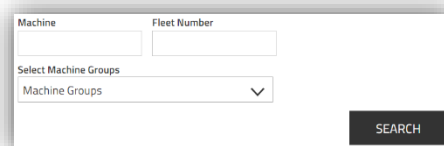
This will display a list of all your trucks, to **view the battery charging cycles** for each truck **click on the BSI symbol** at the end of each row to **open the Battery Details page**.



Contract Utilisation – We recommend to setup this favourite to quickly access the area where you can view Contract Utilisation to check if trucks are over or under contracted hours.

Go to **Utilisation->Contracts**

Leave the **search settings as default** then **click search** and **save this as a favourite**.



This will display a **list of all your trucks** with their **contract hours** and **projected hours**.

If you have **trucks showing red or yellow** you want to try and **swap these trucks** around with trucks which are **showing as blue**.

Swapping busy trucks with **quieter trucks** will help you **balance your contract hours**.

Driver Activity – We recommend to setup this favourite to quickly access the area where you can view Driver Activity to investigate usage of trucks by each driver.

Go to **Utilisation->Activity->Drivers**

Leave the **search settings as default** then **click search** and **save this as a favourite**.



This will display the **working pass information for every driver** who has been using any truck. The **total summary** will display **total key time** and **total operating time**, the **operating ratio** wants to be as high as possible.

Low operating ratio would indicate the **truck has been turned on longer then in use**, to **reduce energy consumption** you want to ensure your drivers are **turning off the trucks when they are not in use**.

This will **increase your operation ratio** and **reduce your total energy consumption**.

9. Extracting Excel Reports.

Within the I_Site Portal you can **extract data in to excel format** which could allow you to create pivot tables or performance charts based of the data extracted from I_Site.

On any page within I_Site which has results displayed, once you have **performed a search to display data**, under the **Search button** you will have **extra icons**.



If you want to **extract the data in to excel format** you can **click on the X-> icon** to **download the data in excel format**.



Below are recommendations on searches you can perform which have data which could be useful for creating your own reports or monitoring any trends which might be occurring on the trucks.

Pre-Operational Results (Full) – We recommend extracting Pre-Op Check Results in to excel for auditing purposes, so you have a copy of all pre-op results completed on site each week.

Go to **Pre-op Check->Results**

Leave the “from and to date” range as default 7 days.

Select Status: Passed, Warning and Failed.

Select Result: Completed, Session too short, Time out.

Tick the “Include Reset Information” box and Click Search.

Extract this data in to excel for a **full copy of all pre-op results completed** over the **last 7 days**.

Pre-Operational Results (Issues) – We recommend extracting Pre-Op Check Issues in to excel so you have all pre-op issues in a single file, you could then discuss these with your site supervisors on a weekly basis to ensure all issues have been investigated and resolved correctly.

Go to **Pre-op Check->Results**

Leave the “from and to date” range as default 7 days.

Select Status: Warning and Failed.

Select Result: Completed, Session too short, Time out.

Tick the “Include Reset Information” box options and Click Search.

Extract this data in to excel for a **full copy of all pre-op issues reported** over the **last 7 days**.

Shock Details (Full) – We recommend extracting Shock Details in to excel, this can be used to calibrate shock settings and provide a list of all shocks on site.

Go to **Shocks->Shock Details**

Leave the “from and to date” range as default 7 days.

Click Search to display all the shocks

Extract this data in to excel for a **full copy of all machine shocks** over the **last 7 days**.

Shock Details (Lockouts) – We recommend extracting Shock Lockouts in to excel, this will also include any comments supervisors have recorded against the shocks after they have completed the shock investigation.

If supervisors are completing a comment for each shock this can prove that each shock has been investigated, if no comment is recorded the supervisor hasn't done a full investigation of the shock lockout.

Go to **Shocks->Shock Details**

Leave the "from and to date" range as default 7 days.

Tick the "Lockouts" and "Include Reset Information" options.

Click Search to display just the shock lockouts.

Extract this data in to excel for a full copy of all shock lockouts, including comments over the last 7 days.

Driver Activity – We recommend extracting Driver Activity in to excel, this will display the total hours of usage per driver and their total operation ratio.

This report also records the logoff method for each driver using the trucks which would indicate a normal logoff (Driver pressed red button to logoff correctly), a battery disconnect (Driver didn't logoff but disconnected battery while logged on) or inactivity timeout (driver left truck unattended and after 10 minutes of inactivity truck timed out).

Go to **Utilisation->Activity->Drivers**

Leave the "from and to date" range as default 7 days.

Click Search to display all driver activity.

Extract this data in to excel for a full copy of all driver activity, including operation ratio and logoff method over the last 7 days.

10. Setting up Report Subscriptions.

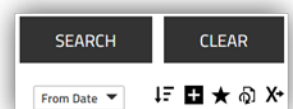
Within the I_Site Portal you can **setup subscriptions to automatically email you excel reports** on a regular basis depending on which report you are viewing (**Daily, Weekly or Monthly**).

The subscription email will state the period the data covers and include the excel file with the data.

Each **subscription will expire after 12 months** but can be **renewed under your account settings** in the **subscription section**.

Each **subscription email will display the valid until date** and provide a **shortcut to I_Site** where you can **unsubscribe or renew your subscriptions**.

On any page within I_Site which has results displayed, once you have **performed a search to display data**, under the **Search button** you will have **extra icons**.

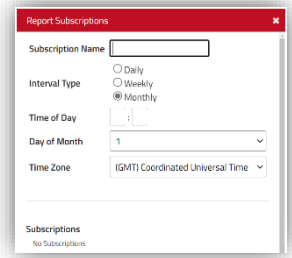


If you want to **setup a Subscription to email you the report**, you can **click on the subscription icon** to **open up the report subscription box**.



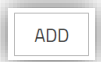
The **report subscription box** will allow you to **set a subscription title** and **select the interval** you receive the report.

You can **choose how frequently and when you would like to receive the email** by selecting the different options.



Any **current subscriptions setup will be listed** at the bottom and can be **managed under your account settings**.

Once you have **selected the options** you can **Click the Add button** to subscribe to the report, this will then **email you the report** at the specified time and frequency for the **next 12 months**.



Following on from the **previous section covering which reports** to manually extract in to excel, we would also **recommend you set subscriptions to automatically email you reports** on a regular interval.

Having **subscriptions setup to email you out reports** can **save you time** having to manually download them and **allowing you to easily review the data** with team members if required.

Below are **recommendations on subscriptions** you can setup to **automatically email you excel reports**, having subscriptions setup can help you **review the data during management meetings**. **Subscriptions will automatically send you the data** instead of you having to download it. These subscriptions are based off the previous sections search settings for each example.

Pre-Op Results (Results) – We recommend to setup this report as a **weekly subscription** to send you a **full copy of all Pre-Op results for every driver and machine**, useful for auditor requests and traceability of pre-op check inspections.

Pre-Op Results (Issues) – We recommend to setup this report as a **daily subscription** to send you a **full copy of all Warnings/Failed Pre-op Check Results**, which could be a driver reporting something wrong with a machine or not completing the pre-op check correctly. Your supervisors and management should be reviewing these results to ensure trucks are being investigated correctly and any faults/issues are being raised and actioned.

Shocks Details (Full) – We recommend to setup this report as a **weekly subscription** to send you a **full copy of all Shocks on all trucks across site**, which you can use to calibrate shocks sensors prior to enabling shock lockouts. This will provide you all shocks from low to high level to allow you to identify the correct levels to set your shock settings for your site.

Shock Details (Lockouts) – We recommend to setup this report as a **daily subscription** to send you a **full copy of all Shocks which have produced a lockout**, this will provide you a list of high shocks which produced lockouts and comments from supervisors.

Driver Activity – We recommend to setup this report as a **weekly subscription** to send you a **full copy of all Driver Activity on all trucks**, this will provide a list of drivers who are not logging off the trucks correctly and show each drivers operation ratio.

11. Setting Up Dashboard Screen.

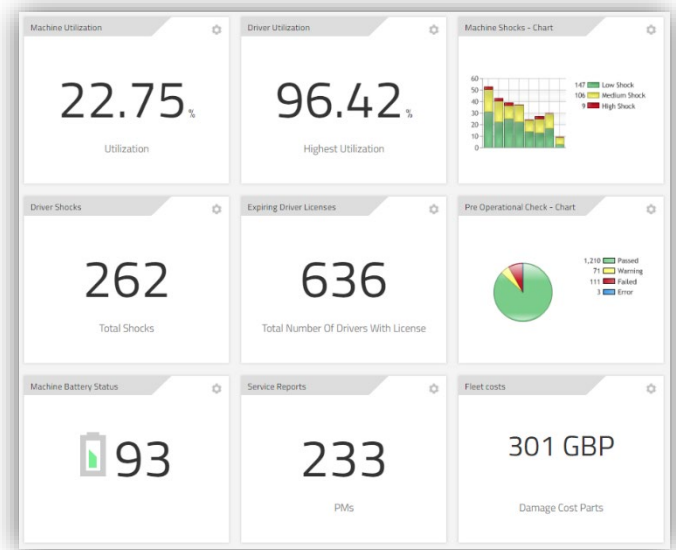
The I_Site Portal has a dashboard for the home screen which can display information within tiles to give you a good overview of what is happening on site with your drivers and trucks.

The **dashboard can be customized** depending on **what data you are interested in viewing**. The **dashboard has 9 customisable tiles** which you can **add to display different information**.

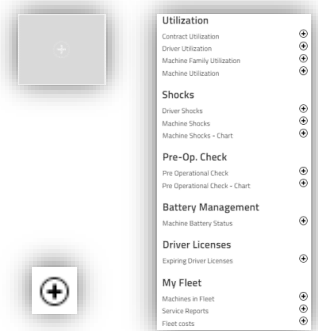
Each tile can be set to **show you data** from a **single site or multiple sites**.

Each **tile can be filtered** by **driver or machines groups** to **focus on certain area's or groups**.

Each **tile is a shortcut** to take you **through to the relevant area** where you can **investigate the data further**.



By **Default 4 tiles** will be loaded on to your dashboard, to **add a new tile** **click on any blank box** to open up the **dashboard tile menu** on the left side.



Depending on **what roles you have assigned** to your user account you will see **different tiles available** to add.

To **add a new tile** click on the **+ icon** on the right-hand side to add that tile.



To **configure the tile** click on the **cog icon** in the top right corner of each tile box.



This will open the **tile configuration box** which will allow you to **customise the tile**.

You can **give the tile a custom title** by entering a new name in the title box.

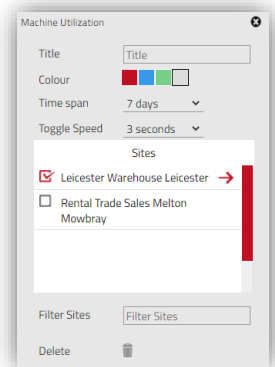
You can **select a colour** for the tile if you wanted to colour code tiles.

You can **choose the time span** of the data the tile will display.

You can **adjust the toggle speed** to display the data quicker (3 seconds recommended).

You can **Select which site to display data** from by **ticking the box**, you can **select multiple sites** and the tile will **display an average for all sites**.

You could have **2 tiles showing the same information**, but have each tile **displaying a different sites data**.



If the tile is a **driver or machine tile** you can **filter by machine or driver groups** by clicking on the red arrow once you have selected a site, this will allow you to **select a group to filter the information**.

If you **tick the group**, you will **only receive information** from **drivers or machines** which are **assigned to the group**.

You can **select multiple groups or single groups** to filter the information displayed.

