Toyota I_Site – Setup Checklist.

What steps should you be taking to setup I_Site?

I_Site UK Helpdesk: I_Site@uk.toyota-industries.eu

Table of Contents

1. **Introduction.**

   The idea of this guide is to provide you with a checklist to follow through during setup to ensure you have setup the features you require.
   If you work your way through the checklist this should help you plan the setup of the system with the different stages required.

2. **User Setup.**

   1. **Identify which staff need to have an account** within your business and **what level of access each user will require**.
   2. **I_Site Administrator** needs to **setup user accounts** and **assign roles to each user**.
   3. **Educate each user** on what you require them to do within the I_Site portal.
   4. **Provide user login details and passwords** to give them access to portal.
   5. **User's login** to I_Site portal and **check their profile settings** and **enable I_Site Email Notification** options.
   6. **User's setup favourite shortcuts** to gain **quick access to data** they need to view.
   7. **User's setup report subscriptions** to email excel reports.

3. **Machine Setup.**

   1. **Configure the machine settings** you require, Go to **Manage Site->Machines** and **select the machine(s) you want to configure** (we recommend selecting identical trucks to configure them in groups, but don't select different types of trucks as they will require different settings).
   2. **New Customers who haven't configured shocks** for your site yet, we recommend reducing the **low reporting level** setting to collect low level shocks to help calibrate the shock sensors later.
   3. **If battery powered machine** and you want to receive **Battery Incident Notifications** enable the **BDI Notification** and **set the percentage** (Recommended Lead Acid: 20, Li-ion: 50).
   4. **Under Miscellaneous** set **comms freq** to **Hourly 1**, Ensure **Pin Reporting** is set to **Yes**, Set **Shift times** for truck (If business hours are 24 hours per day, every day set to 24/7).
   5. **Set desired Pre-op check settings**, enable pre-op check recommended **Yes every new driver** for traceability, **Time until Timeout** recommended **set to 3 minutes**, If **trucks are on-site** already set **For Lockout Reset Profile** to **Yes**, **Randomised Questions** recommended set to **Yes**.
   If you have already **published a checklist** the current **checklist will be displayed**, if not leave this section **blank until you have completed Pre-op Setup**.
   6. **Set Andon to yes** if you want drivers to be able **to use the Andon feature**.
   7. **Set desired Positioning (GNSS) settings**, **Enable GNSS** set to **Yes** will **collect GPRS data** from machines to **display in Maps**, **Select which Geofence** trucks will be assigned to **if Geofence setup**.

4. **Driver Setup.**

   1. **Collect driver and supervisor details** for **who will require access to machines** to **drive or reset lockouts** (Details required listed below).
   Drivers Name – Each driver wants to have their own account for full traceability.

5 Digit Pin code – Needs to be unique per driver, we recommend last 5 digits of employee number.

Card ID – Required for Smart Access only.

Driver Shift Pattern – How many hours and days do they work? Example 8x5 or 12x4.

Profile (Level of Access) – Drivers require "Profile 1", Management who need reset truck lockouts require "Lockout Reset"

License Dates – Start and End dates for Driver licenses for each truck type.

Additional Info 1 – Where and when they work? Example Warehouse Shift A.

Additional Info 2 – What trucks can they drive? Driver example: CBE,RT,LWE,STA, Anyone with Lockout Reset profile we recommend adding RESET.

2. Setup driver's using Create Driver (single) or Driver Upload Template (bulk).

3. Assign driver's to machines they are licensed to drive and update driver.

4. Check machines have updated and downloaded the new drivers.

4. Issue drivers with their pin code or smart access card to **test they can logon to truck**.

5. Show the driver the logon process and **remind them to press the red button to logoff the truck** whenever they go away from the truck to **secure the machine**.

6. Show the driver the pre-op checklist process and ensure they understand how to operate the pre-op check display correctly.

5. **Pre-Op Check Setup.**

1. Create a new checklist or copy questions from an existing checklist, we recommend giving each checklist a version number to track changes (example Reach Truck V1).

2. Setup checklist questions ensuring correct expected answer is set and if the question should be critical or non-critical.

3. Re-read the questions and check answers are set correctly.

4. Set the minimum duration setting at the bottom of the checklist (recommended 45 seconds or higher for small trucks (PPT/LLOP) and 60 seconds or higher for larger trucks (CB/RT/VNA).

5. Select the group of machines the checklist is designed for from the drop down menu and click the add button to assign the group to the checklist.

6. Once you have finalised all the questions and settings you can then **publish the checklist**, **select the send sms to configure machines**, **click publish** and this will **apply the checklist** to the machine.

7. Confirm the checklist has applied to the machine configuration page covered in Machine Setup.

8. Test checklist on truck using a driver profile to ensure it functions as expected, **produce a failure** and **test the Lockout Reset profile can reset the truck** (If any problems you can unpublish the checklist to remove the checklist from the machines).

9. Monitor Pre-op Results for drivers and ensure you are **re-educating drivers** if they are **failing pre-op checks** or **raise a breakdown if any major faults** have been found after you have investigated the failure.

6. **Shock Setup.**

1. Once trucks are in operation with drivers and checklists the next step would be to start

looking at **calibrating the shock sensor** for your actual site.

2. **For new setups you want to adjust the Low Reporting Level** on the trucks to **collect more data**.

3. **Put the trucks in to operation** allowing them to **collect live shock data for 1-2 weeks**.

4. **Setup shock details report** as a **subscription** to **send you the shock details once a week**.

5. **Review the shocks detail report** to **identify the highest shocks** you have recorded.

6. **Adjust shock settings based off data collected** and **set shock levels depending on highest shocks**.

7. Monitor the high shocks after 1 week to **identify how many high shocks** are recorded, if you **have enough supervisors to investigate** all the **high shocks** you could **enable shock lockouts**. If you are receiving **too many high shocks** and feel you couldn't investigate that many, **readjust the shock settings** to reduce the number of high shocks recorded.

8. **Evaluate the shock details report each week**, once **drivers have improved** you can start to **lower the shock settings** to **investigate more shocks**.

9. **Keep reducing the shock settings as drivers improve**, until you start to receive lockouts from normal operation.

10. **Once you are getting lockouts from normal operation**, you want to **slightly increase the shock settings** to **lockout anything above this level** but **accept any smaller shocks** below the level as **day-to-day operational shocks**.

7. Favourites Setup.

1. **Once you are live with pre-op checklists and shock lockouts** you want to **setup favourite search results** to allow you to **quickly access the results**.

2. **Setup Pre-Op Issues as a favourite** to **show you warning and failed pre-op check results**.

3. **Setup Shocks High level as a favourite** to **show you trucks producing high shocks**, if shock **lockouts enabled to yes** these **shocks would produce lockouts**.

4. **Setup Shocks lockout as a favourite** to **show you trucks producing lockouts** including the **reset information**.

5. **Setup Driver Acitivity as a favourite** to **show you all activity for each driver** and their **operation ratio**.

8. Subscription Setup.

1. **Setup Pre-Op Results** as a **weekly subscription** to send you a **report of all pre-op results** each week, this can be useful if you need to prove you have been completing your pre-op checklists.

2. **Setup Pre-Op Issues** as a **daily or weekly subscription** to send you a **report of all warning and failed pre-op check results**, this will provide you a list of all issues reported with the truck so you can ensure they have all been investigated.

3. **Setup Shock Details** as a **weekly subscription** to send you a **report of all shocks on site**, this can be used to calibrate your shocks.

4. **Setup Shock Lockouts** as a **daily or weekly subscription** to send you a **report with all shock lockouts** which have occurred on site, this will also include your **shock comments added by supervisors**.

5. Setup Driver Activity as a **weekly subscription** to send you a **report of all driver activity**, this can be used to identify the driver's logoff method and operation ratio.

9. **Dashboard Setup.**

1. On the I_Site home page is the dashboard tiles which can be **customised to display information** you might be **interested in viewing on a regular basis**.
2. Click on an empty tile to bring up the **dashboard side menu**, **click the + icon** next to each option to **add that tile to the dashboard**.
3. Click on the cog icon of each tile and **set a custom title** and **select the tile colour** if required.
4. Set the toggle speed to **3 seconds** to **filter through the data quicker**.
5. Select the site or sites you want to **display data from in the tile**.
6. If your site has groups setup, you can **click on the arrow icon** next to the site to **filter information from a single group or multiple groups** (Machine tiles can be filter by machine groups, driver tiles can be filtered by driver groups).