

TOYOTA

MATERIAL HANDLING

Toyota I_Site – User Management.

Managing system users and access to the portal.



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

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1. Introduction.

The idea of this guide is to cover **setting up new users** on the system, **managing existing users** and **ensuring the correct level of access** has been **assigned to people within your business**. With **GDPR** it's important you are **managing your users access** to the I_Site portal to ensure only the **correct people are viewing the information**.

By **default the I_Site portal is GDPR compliant** and **without assigning any roles to users** they **will not be able to see any drivers details** which can be **classed as personal information**.

It's **important to have user accounts removed** as part of your **staff offboarding process** if you have **any staff leave the business**, you need to **ensure their user account is also removed** to **secure your system and data**.

2. Setting up a New System Users.

To **setup a new user on the system** you will require the **"User Administrator" role** assigned to your profile, only **I_Site Administrators can setup new user accounts**.

Login to the I_Site portal and **Click Administration** at the top, then **Click Users** in the left side menu under Administration.

Click Search to display a list of all current users on the system.

Click Create User button to open the **Create User** window.

Enter the email for the new user you want to setup and **Click Next**.

You can only have **one user account per email**, if you receive an error about "email already in use" please contact the UK I_Site Helpdesk.

Once you have entered the email it will take you through to the **user details page**, **complete all the fields** and **select which site** you want to **give the user access to** using the site dropdown. If you want to give access to multiple sites you will have to add additional sites after the user is created.

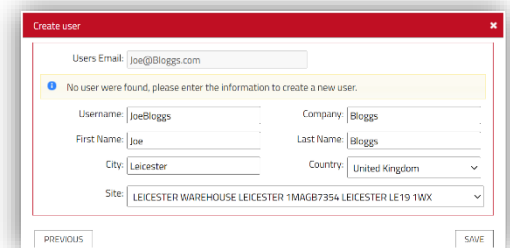
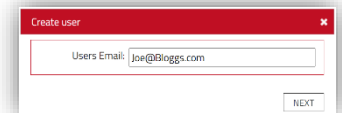
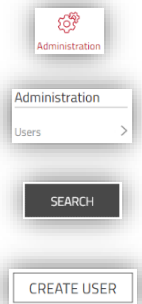
You will then **receive an email with the login details** of the user you have just created.

Once you have shown the user what to do within I_Site you can then **forward on their login details** and let them login to the system.

3. Viewing what Sites/Roles are Assigned to Users.

By default new user's setup on the system **will have no roles assigned** to their account, this is to make the system GDPR compliant and **allowing you to control what level of access** users have **within your business to the I_Site portal**.

To **view users current access** go to **Administration->Users** and **Click Search**.



This will give you a **list of all users** who are currently **setup with accounts** for your site.

To **view a single users roles and sites**, click on the **down arrow** at the end of each row.



To **view all users roles and sites**, click on the **[+]** button under the create user button.



This will **expand the additional information underneath each user**, here you can see **what sites and roles** the user account has assigned to their account.

Last Name	First Name	ID	Last Logon (UTC)
Bloggs	Joe	JoeBloggs	N/A
Roles			Sites
Map functionality			LEICESTER WAREHOUSE
Immobilizer			
My Fleet - Fleet list			
My Fleet - Contract Cost			
My Fleet - Service Reports			
Remote Shock Lockout Reset			
My Fleet - Non-Contract Cost			
My Fleet - Service Reports detailed			
Driver Info			
Driver Administrator			
Machine Administrator			
User Administrator			
Manage PreOp Checklists			

4. Adding/Removing Site Access.

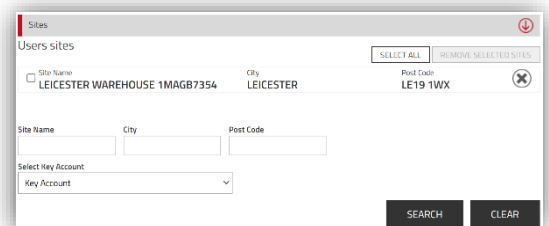
If you **have access to multiple sites** and want to **add/remove access to additional sites** to other users you can do so, you can only **give access to sites you have access to** yourself.

Please note if you **add extra sites** to a user, any **roles the user already has assigned** will be also **applied to the new sites** you add to the user.

To **add or remove sites** from a user, Go to **Administration->Users** and **Search** for the user you want to manage.

Click on the user ID to open up their user profile and go to the **Users Sites** section.

Click search to display a list of all **available sites to add** or search by site name, city or Postcode to narrow down the results.



To **Add a site** to the user **click on the (+)** button to add it.



To **Remove a site** from the user **click on the (x)** button to remove it.



5. Adding/Removing Role Access.

Within I_Site you have **full control over what level of access** users have on the system and you can **assign different roles** to **give users access to different features** within I_Site.

By **default no roles are assigned** to a user account, so to enable users to be able to use the

system correctly **you will need to assign roles to each user.**

It's **important to manage the roles correctly** and **only assign the roles required** for the user's position within the business.

The **system is GDPR compliant by default** so **without any roles assigned** to the user they will be **unable to see any driver details.**

To **enable users to see driver details** you will need to **assign the "Driver Info" role** and this is what we class as the **"Read Only" profile.**

This will allow users to **see the drivers name and pin number,** but **not to adjust anything** else within the system.

I_Site User Administrator's can only give access to roles you have access to yourself.

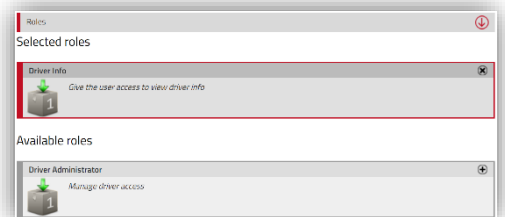
If you are missing roles from your Administrator account please contact the UK I_Site Helpdesk and we can add any missing roles if required.

To **add or remove roles** from a user, Go to **Administration->Users** and **Search** for the user you want to manage.

Click on the user ID to open the user profile and **go to the Roles section.**

If the **user currently has roles assigned** to his profile these will be **listed under the Selected Roles section.**

Any **Roles which are available to Add** to the user will be **listed under the Available Roles section.**



To **Add an Available Role,** click on the **(+)** button to add it and it will move to the **Selected Roles section.**



To **remove a Selected Role,** click on the **(x)** button to remove it and it will move back to the **Available Roles section.**



6. Deleting Users from the System.

If any **I_Site users leave the business or change roles** it's important to **delete their user account** if they **no longer require access** or **adjust their roles to match their new role.**

You need to **ensure only the correct people have access** to the system as the system does contain **sensitive GDPR information.**

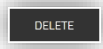
Any **users who have any administrator roles** who have **left the business must be deleted** from the system as soon as possible to **ensure the system is secure** and old accounts can't be **misused to affect your business.**

It's **important to ensure** that any **I_Site users have their accounts removed** as part of the **Off-boarding process within your HR department,** this should **help you ensure** that this is being completed and you are **keeping the system secure and removing access when required.**

To **Delete a user** from the system, Go to **Administration->Users** and **Search** for the user you want to manage.

Click on the user ID to open the user profile and click the delete button.

Confirm you want to delete the user and this will remove the user from the system.



7. Recommended Roles for Staff Positions.

Below are some **recommendations as to what roles to assign to users** within your business depending on their role.

Administrator – Administrators will have **full access to the system** and should **manage the setup of the system**, Administrators will have **all roles assigned to their profiles** enabling them to **add or remove roles for all users**.

Recommended roles:

Map functionality, Immobilizer, My Fleet - Fleet list, My Fleet - Contract Cost, My Fleet - Service Reports, Remote Shock Lockout Reset, My Fleet - Non-Contract Cost, My Fleet - Service Reports detailed, Driver Info, Driver Administrator, Machine Administrator, User Administrator and Manage PreOp Checklists.

Health & Safety – Health & Safety will have **access to Setup, Adjust, Publish and Delete Pre-Operational Checklists**.

Recommended roles:

Map functionality, Driver Info and Manage PreOp Checklists.

Trainer – Trainers will have **access to setup new drivers, update license dates, update driver groups and add drivers to machines**.

Recommended roles:

Map functionality, Driver Info and Driver Administrator.

Manager/Supervisor – Managers/Supervisors will have **limited read only access to access the data but not change anything**.

Recommended roles:

Map functionality and Driver Info

Additionally to the above recommended roles you can **enable users** to be able to **perform remote resets of failed pre-op checklists and shock lockouts** if required.

These **roles should only be used in an emergency**, when **no one is on site to be able to reset a truck**.

You want users to go down to the truck to investigate any issues or faults, anyone **resetting a machine remotely might reset an unsafe machine** and could put drivers at risk.

But if **no supervisors are on-site** this could **save you having to travel to site to reset a truck**.

We would recommend **only to assign these roles to staff high up within your business** and the roles **should only be used when no supervisors are available locally** to investigate the lockout **on the truck**.

To grant access to **remotely reset failed pre-op checklists**, add the **Immobilizer Role**.

To grant access to **remotely reset shock lockouts**, add the **Remote Shock Lockout Reset** role.