

TOYOTA

MATERIAL HANDLING

Toyota I_Site – Driver Management.

Managing driver profiles and machine access.



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TOYOTA

MATERIAL HANDLING

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1. Introduction.

The idea of this guide is to cover **setting up new drivers** on the system, **managing existing drivers** and **ensuring the correct machine access** has been **assigned to drivers within your business**.

To **manage drivers within I_Site** you will need the **"Driver Administrator"** role assigned to your user account.

Your **I_Site Administrator** would be able to **give access to this role** if required.

2. Setting up a New Driver Profile.

To **setup a new driver on the system** you will require the **"Driver Administrator"** role assigned to your user account.

Login to the I_Site portal and **Click Manage Site** at the top, then **Click Drivers** in the left side menu under **Manage Site**.

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

Click Create Driver button to open the **Create Driver** Page.

Enter the Drivers Name and a **Unique 5 digit Pin** in the **required fields**.

Each driver needs to have a **unique pin to identify between each driver**, and this will be **used to logon to the machine** if pin access.

We **recommend using the last 5 digits** of your **company employee number** if applicable.

If the **Pin Number is already in use** on the site you will receive this warning.

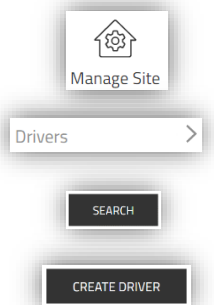
If you know the **drivers driving license start and end dates** you can **click edit** to open the **Driver License** window.

We have **separate license groups for each machine family** and if we **specify separate start and end dates** the **system will restrict access** to each machine family if the **license expires**.

If you have **one license date to cover all trucks** you can tick the **Same for all** tick box to **apply the same dates** to all fields.

Once all dates are added **Click OK** the close the window.

If you **have access to more than one site**, you can **select which site** you want to **add the driver** to by using the **Site Drop Down Menu**.



The entered PIN is already used by another driver within this site



Click **Create Driver** to **create the driver** and open the **Driver Details** Page.



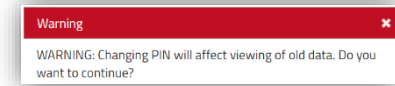
The **Driver name and Pin** will be populated from the previous page but you will need to **finish setting up** the rest of the **driver details** page.

Driver details form with the following fields:
Driver: Joe Bloggs
Pin: 54321
Card ID: (empty)
Profile: 1 (dropdown)
Shift Times: 8x5 (dropdown)
Driving License: Multiple values (with EDIT button)
Additional Info 1: (empty)
Additional Info 2: (empty)

Driver name can be adjusted if required.

Pin can be adjusted but doing so will affect viewing view old data.

If you **change the pin number** you will **receive a warning** explaining **viewing old data will be affected**.



We **recommend not to adjust the pin number** on active drivers, **changing the pin number** on the driver will **unlink any previous data** associated to the **driver pin number**.

If you need to **replace a pin number** for a driver we **recommend to archive the old driver profile** and **setup a new driver profile** with a **new pin number** (See Section 7).

This will **still allow you to access the old data** if required but also allow you to **issue a new pin number** to the driver.

The **Card ID field** is required for **Smart Access only**, if you are using **Smart Access cards/fobs** to logon to the truck **instead of Pin Access**.

If you are a **Smart Access customer** for more **information on scanning the Card ID** please refer to the **Smart Access Guide in the Help Centre** for more details.

The **Profile drop down menu** is how you can **assign what level of access** the **driver will have on the trucks**.

Normal Drivers should be **Set to Profile 1**.

Managers, Team Leaders or Supervisors, who will **require access** to **Reset any Lockouts** on the trucks from **either a Failed Pre-Op Checklist** or a **Shock Lockout** will need to be **Set to Lockout Reset**.

The **Supervisor Lockout Profile** option **will only lock a truck out** and **doesn't give you the option to say why**, so for **more traceability** we **recommend to Enable Pre-Op Checklists questions** for the **Lockout Reset Profile** and use the **checklist questions** to lock the truck out instead.

This profile **will not allow you to reset** a truck, so we **recommend not to use this profile to lockout trucks**.

If you **require to lockout a truck**, we **recommend to fail it on a pre-op check question** to give you **more traceability**.

This **will provide you** with the **Pre-Op checklist results** explaining **why the truck was locked out**, so the next supervisor **doesn't have to do a full inspection** of the truck, allowing them to **just check the faults reported** in the **checklist results**.

Profiles 2-9 can be used to **apply different speed settings to drivers on trucks**, before you can **select these profiles within I_Site** you would need an **Toyota Engineer to program the speed profiles on all I_Site trucks** on site.

If you **select a profile which hasn't been configured on a truck** you might give the driver more speed than expected.

If you are **wanting to use these speed profiles** you will **need to ensure all I_Site trucks** have the **same profiles configured on all I_Site trucks on site** before you **select these profiles in I_Site**.

Shift Times drop down menu can be used to **specify the drivers shift patterns**, this setting is only for **displaying the utilisation data** and **won't restrict a driver from driving longer then the time specified**.



So for example if the **driver was set to 8x5** but he did **overtime and was driving a truck** for a **total of 10 hours** in one day.

This **wouldn't stop him from driving** the truck **longer than 8 hours**, but it would **display the driver utilisation as 125%** for that day.

Having **shift times set correctly for each drivers** working pattern will **help you identify** who are the **busiest drivers on site**.

Any **Lockout Reset profiles who do not normally drive** but are supervisors who are office based, we **recommend to set the shift times to 0x0** to avoid pulling down the average utilisation figures for your drivers.

If they are a **driver and a supervisor** who needs to reset trucks, we **recommend to setup two separate driver profiles** one as **Profile 1** and one as **Lockout Reset** profile.

Driver Licenses can be **updated via the Driver Details** page by **clicking the Edit** button next to driver license.



If **license dates are specified** the **system will restrict access** if the **license has expired**.

Additional Info 1 we **recommend to specify where and when the driver works**, so for example if the **driver worked in the Warehouse** and **worked on Shift A** you would want to **add "Warehouse Shift A"** to **Additional Info 1**.

Additional info 1 can then be used to help **setup driver groups** to **filter the data from I_Site** but to also **highlight if the driver is still with the business** or if they have **left the business**.

Additional Info 2 we **recommend to specify what types of trucks** the **driver has a license for**, so for example if the **driver has a license to drive Reach Trucks** you could **add RT to this field**. If the **driver has a license to drive Counter Balance Electric Trucks** you could **add CBE to this field**.

Aslong as you **add a tag which identifies which trucks** the **driver has licenes for**, this will allow you to **easily manage the drivers** by **searching for the correct tags**.

Additional Info 2 can then be used to help **add the correct drivers to the correct machines** by **searching for each tag**, this will then **just display the correct drivers**.

If the driver is a **Lockout Reset profile** and has **no licenses to drive a truck** but are **responsible for resetting any lockouts on the trucks** we recommend to **add RESET to this field**.

So to **identify the correct drivers** you can **search for the truck tag** and to **identify any lockout reset profiles** you could **search for Reset**.

This will allow you to **search and find the correct drivers** to **add to the correct machines**, meaning you can **manage your drivers** with a **couple of searches and clicks**, instead of having to **work through a list of driver names** **picking out the correct drivers** to add. It's **important to keep Additional Info 1 and 2 updated** with the **correct information** as this will allow you to **manage the drivers on the system easier**.

Once all of the **driver details have been specified** correctly you can then **update the driver to save** the **changes to the driver profile**.

You will still need to **assign the machines to the driver (Single Driver)** or **assign drivers to machines (Multiple Drivers)** which is **covered in Section 4 or 5** in this guide.

3. Uploading New Drivers using the Driver Upload Template.

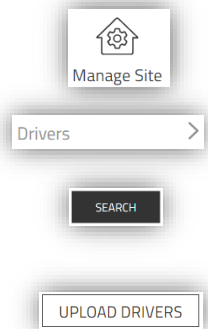
New customers who haven't setup any drivers can use the **Driver Upload Template** to upload **multiple drivers using a single excel file**.

The **Driver Upload Template** can **only be used for new drivers** to the system and **can't be used to edit existing drivers**.

Login to the I_Site portal and **Click Manage Site** at the top, then **Click Drivers** in the left side menu under **Manage Site**.

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

Click the Upload Drivers button to display the **Upload Drivers Window**.



The **Driver Upload Template** can be **downloaded by clicking here** at the end of the first sentence, once downloaded you can **start to populate the excel file** with your **driver details**.



Open the excel file on your computer, the **top column displays what information** needs to be **added to each row**.

Column D (Site) has a **dropdown menu** for you to **select which site the driver will be created on**, if you have **access to multiple sites** you can **setup drivers on multiple sites** using a **single Driver Upload Template**.

When you **select the site** using the drop down menu **Column G will autopopulate** with a number, **Do Not Adjust this number** or your **driver upload will fail**.

Ensure you have **only selected the site** on a **row which includes driver details** or you will **receive a error** when you try to upload the file.

Driver	PIN	Card ID	Site	Profile	Shift Times (Expected Groupid)	Additional Info 1	Additional Info 2
Example Driver	12345		LEICESTER WAREHOUSE LEICESTER, 1MAGB7354		1 8x5	20503 Warehouse Shift A	CBE,RT,ST,PPT
Example Leader	98765		RENTAL TRADE SALES MELTON MOWBRAY, 1MUGB2000	Lockout Reset	0x0	61973 Warehouse Manager Shift A	RESET

After Additional Info 1 + 2 Columns will be the columns where you can enter the Start and End dates of each licenses for machine families.

If you specify a Tag which relates to each license in Additional Info 2 you can use this to identify the drivers who have a license for that type of machine.

So for example if a driver has a Counter Balance Electric license you could add CBE.

If you have some Low Lifting Powered Pallet Trucks and you call them PPT's then add PPT.

As long as you know what tag relates to what type of trucks you can then search for this information to just show you the relevant drivers.

Additional Info 2	CBE - Driving License Start	CBE - Driving License End	CBI - Driving	CBI - Driving	LOW - Driving License Start	LOW - Driving License End	PI
CBE,RT,ST,PPT	10/01/2023	10/01/2026			11/12/2022	11/12/2025	
RESET							

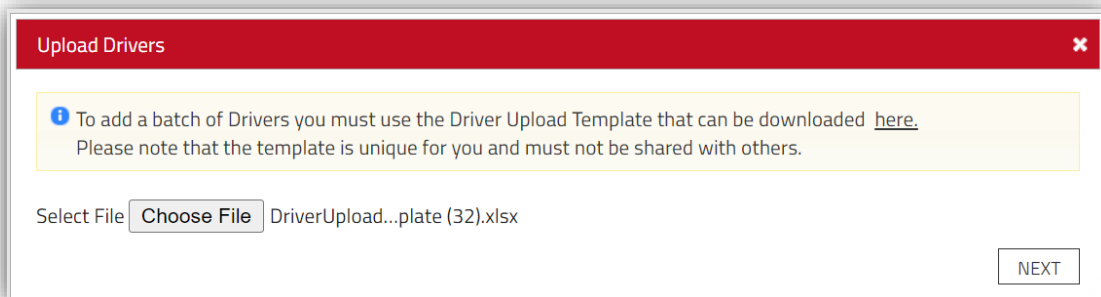
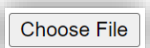
You can only use the Driver Upload Template to create new drivers, you can't use the template to update existing drivers.

So it's important to complete as much detail in the driver upload template before you upload, any additional changes would need to be made on each driver profile separately in the portal.

Once you have completed all the details for your drivers and have saved the full driver upload template to your PC you are ready to upload the drivers to the portal.

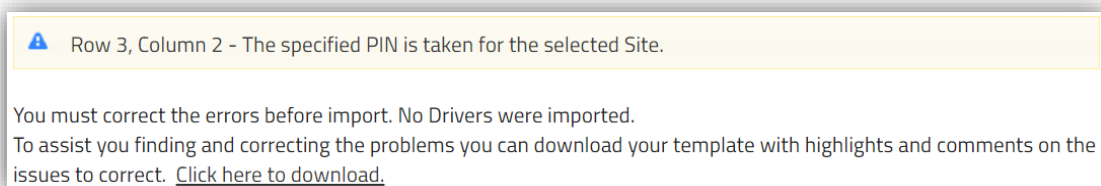


Go to Manage Site->Drivers and click on the Upload Drivers button then click the choose file button and select your driver upload template and click open, then Next.



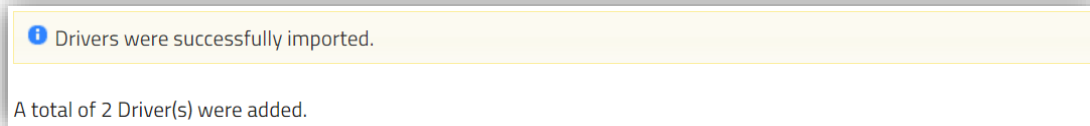
This will then start the upload of the drivers and if any issues with the driver upload template a error will be displayed explaining what caused the error.

The error will display what row and column is causing the issue and a description as to why the upload has failed, correct any issues and retry to upload once corrected.



To assist you finding any problems within the template you can download a Upload Report with highlights and comments on the issues to correct, this can be downloaded using the Click here to download option.

If the **template upload has been completed successfully** and **no errors was found** you will **receive the success notice** shown below.



You will still need to **assign the machines to the driver (Single Driver)** or **assign drivers to machines (Multiple Drivers)** which is covered in Section 4 or 5 in this guide.

4. Managing Machine Access via Driver Profile.

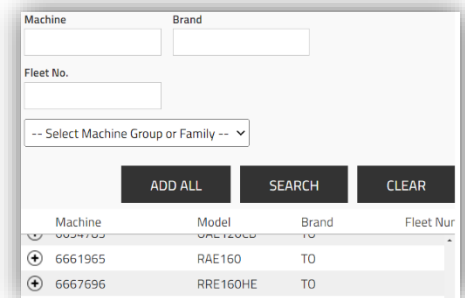
Once the **Driver Profile has been setup** you can then **assign machines to the driver**, at the **bottom of the Driver profile page** will be the **Assigned Machines section**.

Assigned machines			
Machine	Model	Brand	Fleet Number
<input checked="" type="checkbox"/> AS-DEMO-BOX	BOX	XX	

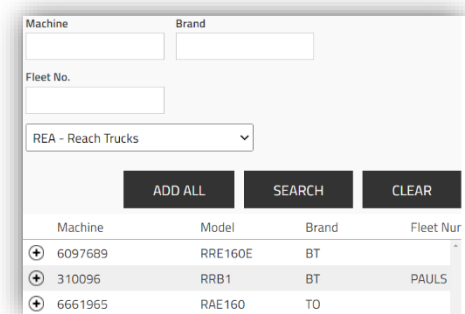
Any **machines allocated to a driver will be listed on the left side under Assigned Machines**, to add machines to a driver click on **Add Machines to Driver** button.



This will **open the machine menu on the right side** and **display a list of all available trucks** to add to the driver. **Clicking on the (+) icon** will add that machine to the driver and **moving the truck to the assigned machines** section on the left side.



If you want to **assign a group of machines** you can use the **Select Machine Group or Family** from the drop down menu to **narrow down the trucks displayed**. So for example if your **driver has a Reach Truck license** you could **select the REA – Reach Truck machine family** and **Click search** to display just the **Reach Trucks**, you could then use the **Add All button** to add all **Reach Trucks** to the driver.



If you want to **add multiple drivers to machines** at once you can do so, to select **multiple drivers** use the **tick box next to each driver** on the **Manage Site->Drivers overview page**.

Driver	PIN Code	Profile	Additional Info 1	Additional Info 2	
<input type="checkbox"/> Example Driver	68512	1	Warehouse Shift A	PPT	▼
<input checked="" type="checkbox"/> Example Driver	57842	1	Warehouse Shift A	RT	▼
<input type="checkbox"/> Example Driver	64859	1	Warehouse Shift B	CBE,PPT,RT,VNA	▼
<input checked="" type="checkbox"/> Example Driver	00107	1	Warehouse Shift B	RT	▼
<input checked="" type="checkbox"/> Example Leader	32687	Lockout Reset	Warehouse Manager Shift A	RESET	▼

If you have used the **Additional Info 2** field to **populate your driver details** with **what types of trucks they can drive**, you can also **use this to help narrow down your search of drivers** which would **allow you to use the Select All button** instead of having to **manually select each driver** using the tick box.

So in the below example all the **Reach Truck drivers** have **RT in Additional Info 2**, **Searching for RT** will **only show you Reach Truck drivers**.

As long as you are **updating the Additional Info fields** with the **correct driver details** you can **use this information** to **easily find the correct drivers** you want to manage.

Driver	PIN Code	Profile	Additional Info 1	Additional Info 2
<input checked="" type="checkbox"/> Example Driver	85967	1	Warehouse Shift A	CBE,RT,ST
<input checked="" type="checkbox"/> Example Driver	57842	1	Warehouse Shift A	RT
<input checked="" type="checkbox"/> Example Driver	64859	1	Warehouse Shift B	CBE,PPT,RT,VNA
<input checked="" type="checkbox"/> Example Driver	00107	1	Warehouse Shift B	RT

Once you have **selected the drivers** you want to add machines to, you can then use the **Configure Selected** button to **configure all selected drivers together**.

This will **open the driver details page** and **highlight the total number of drivers selected** at the top.

If any **fields are showing Multiple Values** this means the **information in the field is not the same** for all **drivers you have selected**, if you **overwrite any information in these fields** it will **replace it for all drivers selected**.

Only adjust these fields if **all drivers should have the same information** in the field.

Driver details

Number of selected drivers: 4

Profile: 1

Shift Times: 8x5

Driving License: Multiple values [EDIT]

Additional Info 1: Multiple values

Additional Info 2: Multiple values

If the **selected drivers already have machines assigned** to them the **machines they are assigned to will be displayed** on the **left side** under the **assigned machines** section.

If you have **any trucks displaying the yellow (!) symbol**, this means that **not all drivers selected** have **access to this machine**, if you know the **drivers should be assigned** to the machine you can **click the (+) symbol** to **add the truck to all drivers selected**.

If you **do not add the truck** then the **current driver access will not be adjusted** for the machines.

Assigned machines

Machine
<input checked="" type="checkbox"/> SR-DEMO-BOX
<input checked="" type="checkbox"/> <input type="checkbox"/> AS-DEMO-BOX

Click the **Add Machines to Driver** button to load up a **list of available trucks** on the **right side**.

To **Add a machine to the driver** click the **(+)** icon to **assign the machine** to the driver.

To **Remove a machine from a driver** click on the **(x)** icon to **remove** it from the **assigned machines** section.

Once all the **correct machines** have been **assigned to the driver profile** you can then **click the update button** to **send the driver profile to the machine**.

This will **give you two options**, **Send SMS & Save** or **Save**.

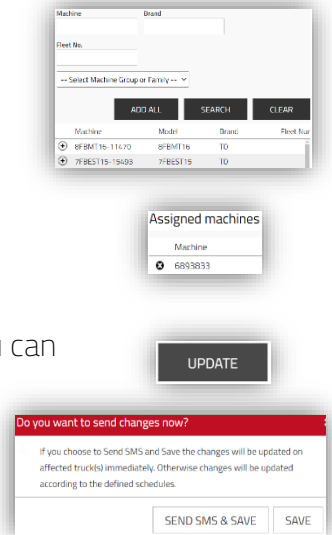
If you **click Send SMS and Save** this will **send a communication** to the **machine to update the drivers**.

If you are **using the Send SMS and Save** option **we recommend to make note of what time** it is, so you **can then check the Machine Last Updated timestamp** to **confirm if the truck has updated with the new drivers**.

This way you can **identify if the truck has updated** with the **latest drivers** before going to **test the machine**.

If you just **click the save option** the **truck will update on its next communication** with the server.

We **recommend to check the machine has updated the drivers from the server** before going to **test any newly added drivers**, please refer to section 6 for more details.



5. Managing Driver Access via Machine Configuration.

Once the **Driver Profiles have been setup** you can then **assign drivers to machines**.

This can be an **easier method to add all licensed drivers to the correct machines**, if you have **various models** of a **certain type of machine**.

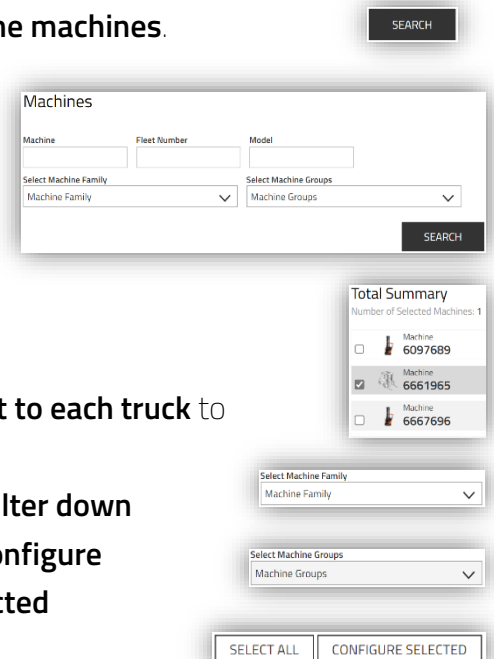
Go to **Manage Site->Machines** and **Click Search** to **display all the machines**.

At the top of the page, you can **filter down the machines** using the **search options** or by **selecting a machine family** or **machine group** to **narrow down the machines displayed**.

To **configure a single machine** click on the **machine name** to open the **configuration page**

To **configure multiple machines** you can use the **tick boxes** next to each truck to **select more than one machine to configure**.

Or if you are **filtering by Machine Family or Machine Group** to **filter down certain types of trucks**, you could then use the **Select All and Configure Selected** buttons to **select all machines** and **configure the selected machines together**.



If for example you are **looking to setup your Reach Truck driver's** you could use the **REA – Reach Truck machine family** just to **display the Reach Trucks**. This would then **allow you to use the select all button and configure selected** button to **configure all Reach Trucks together** in one go.

Once the **machine config page** has loaded go to the **driver's section** at the **bottom of the page**.

			REMOVE ALL DRIVERS	ADD DRIVERS
	Description	PIN Code	Additional Info 1	
⊗	Example Driver	85967	Warehouse Shift A	
⊗	Leaver Example Driver	00107	Left the Business 17/02/2021	

Any **drivers assigned to the machines** will be **displayed in the list** showing the **drivers pin code** and **Additional Info 1**.

If you **have been populating the Additional Info 1** field this can be **helpful to identify** if the **correct drivers are assigned to the machines**.

In the **above example** you **can tell one driver has left the business** and **shouldn't be assigned to the machines any longer** and **one driver works in the Warehouse on Shift A**.

It's **important this information is updated** to **help you manage your drivers** on the system, if you **have any leavers** you want to **ensure you are archiving them correctly**.

This will **help to ensure the correct drivers** are **only assigned to the machines**.

Click the **Add Drivers** button to open the **Add Drivers window**.

If you **Click Search** this will **display all the drivers not assigned** to the machines at the **bottom of the window**.

You can **use the (+) icon** to **add a driver** to the machines you are configuring.

For example if you have **just selected your Reach Trucks to configure** and have **populated the Additional Info 2** to **identify what types of truck a driver can operate**, you could **use the Additional Info 2 field** to **Search for the correct drivers**.

Search in Add Drivers window **Additional Info 2** field for **RT** to just **display your Reach Truck Drivers** in the list below, you **could then use the Add All button** to **Add all the drivers displayed**.

If you are **using Reset in Additional Info 2** to **identify your Lockout Reset profiles**, you can then **Search for Reset** to **find all drivers** with the **Lockout Reset profile** to **add to the machines**.

So with **two searches and two clicks** you **can add all the correct drivers and lockout reset profiles** by using the **Additional Info 2 field**.

Once you've **added the correct drivers**, click the **update button** then **choose Send SMS and Save or Save** to **update the machines**.

Once you have updated the machine you want to **confirm the machine** has updated with the server, see **Section 6** for more details.

6. Confirming Machines have Updated with the Server.

Once you have **added your drivers** and **updated the machines**, we **recommend checking the machine has updated with the server** before trying to **test the machines**.

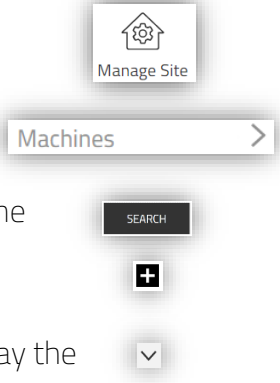
This is **good practice to make sure the machines are communicating correctly**, helping to **ensure the truck has the latest settings from the server** and **avoid wasting time when testing any the machines**.


When **updating the machine** if you **used the Send SMS and Save option** this will **send a communicating to the machine to update the settings**, if the **machine is in an area with good mobile reception** and is **powered on** the **machine should update within a couple of minutes**. If you **used the Save option** this will **update the server** and the **next time the truck communicates with the server** on its **scheduled communication frequency** it will **download the new settings**.

To **check when machines have last updated with the server** go to **Manage Site->Machines**.

Click on Search to display a list of all trucks, under the **search button** click on the **[+] button** to **expand the additional information** under each truck listed.

You can also **use the drop down arrow** at the **end of each machine row** to **display the additional information for a single machine**.



Machine	Fleet Number	Machine Family	Model
<input type="checkbox"/>  6893837		LOW - Low Lifters	LWE200
■ Shift Times: 8x5 ■ Comm Freq: Hourly, 1 ■ Last Updated: 27/02/2023 15:23:23 ■ Key Hours (A): 2,916 ■ Operating Hours (B): 847 ■ Drive Hours (C): 845 ■ Lift Hours (D): 49			

The **Last Updated date and time stamp** indicates the last time the **machine updated with the server**, if **adding new drivers** or **adjusting machine settings** once the **machine has applied the new settings** this **time stamp will be refreshed confirming the update**.

If the **battery is disconnected** on an **electric machine** or if the **machine is powered by a combustion engine** and **hasn't been turned on** the **machine will not be able to update**.

Or if you have **poor mobile network signal** in **certain area's of your site** the **truck might be located in an area** and **where it can't receive a signal to update**.

Relocate the truck to area with known good signal if having **issues updating machines**.

Checking the machine last updated can help confirm the truck has updated the latest settings from the server, **always check the machine has updated before going to test the machines**.

If the **truck is in operation** and you notice the **Last Updated is showing a old date** this can indicate the **truck has a communication issue** and you should **contact the UK Connectivity Team** for additional support (I_Site@uk.toyota-industries.eu).

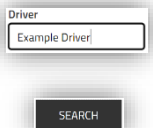
7. Archiving/Disabling a Driver Profile.

If you have any drivers leave the business it's important to Archive and Disable the Driver profile.

We recommend keeping the driver profiles on the system so historic driver information would be available if required, keeping the data available for up to 5 years could help with any legal claims being made against your business.

Deleting a Driver Profile from the system will affect viewing any historic information and it's important to maintain the data within the system, we recommend you Archive the driver to maintain the historic information.

Go to Manage Site->Drivers and search for the driver you want to archive or disable.

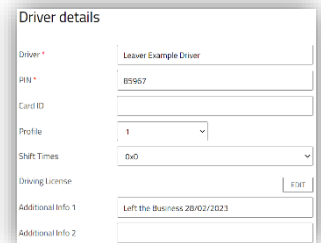


A search box with the text "Example Driver" and a "SEARCH" button below it.

Click on the Drivers Name to open the Driver Details page.

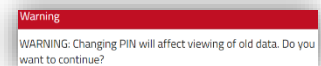
To help organise the list of drivers or group drivers you could update the driver name to include Leaver or Disabled for example at the start of their name.

This would group your drivers together when sorted in alphabetical order.



A screenshot of the "Driver details" page. It shows fields for Driver (Leaver Example Driver), PIN (89867), Card ID, Profile (1), Shift Times (0x0), Driving License (with an "EXIT" button), Additional Info 1 (Left the Business 28/02/2023), and Additional Info 2.

Adjusting the PIN of an existing driver will affect viewing old data, if you need to issue a new pin, archive the old profile and setup a new driver profile with a new pin number.



A red warning box with the text: "Warning: WARNING: Changing PIN will affect viewing of old data. Do you want to continue?"

If you are using Smart Access and can re-issue the card/fob to a new driver you would first need to delete the Card ID to allow you to re-assign the card to a new driver, if you try to re-assign a card to a new driver profile without removing it from the old driver profile you will get a Card ID already in use error.

If Profile is set to Lockout Reset we recommend to set it back to Profile 1 just in case the driver was allocated back to a machine by mistake, at least it won't have the capability to reset a lockout.

For Shift Time set this to 0x0 as the driver will no longer be driving and this will stop the average driver utilisation figures being reduced by inactive drivers.

If any License dates have been applied to the driver we recommend to remove them, to avoid getting any misleading notifications of driver licenses expiring for drivers who have already left the business or don't require access any longer.

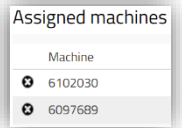
For Additional Info 1 and 2 we recommend to delete all information from both fields and use Additional Info 1 to identify why the account is no longer required.

So for Example: **Left the Business, Pin No Longer In Use, Driver Under Investigation.**

Anything that will help you identify why the driver profile is no longer required, if any drivers are assigned to machines you can use Additional Info 1 to identify if they should be or not as we recommend to use Additional Info 1 to identify where and when they work for active drivers.

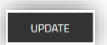
You also **need to remove the machines from the driver profile** if you want to **fully disable the drivers access to machines.**

All **machines assigned to the driver** will be **listed at the bottom of the profile page**, use the **(x)** button to **remove the machines from the driver profile.**

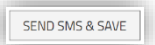


Assigned machines	
Machine	
6102030	<input type="checkbox"/>
6097689	<input type="checkbox"/>

Once the **machines have been removed from the driver profile** you can then **update the driver** to **remove the machines from the driver.**



When **disabling users we recommend to use the Send SMS & Save option** to **force a communication** to the **machines to update as soon as possible.**



If you use the **Save option** the **machines will update** on their **next hourly communication** so if you **want to remove the driver as soon as possible** always **use the Send SMS & Save option.**

8. Deleting a Driver Profile.

WARNING – **Deleting a driver from the system will affect viewing old data.**

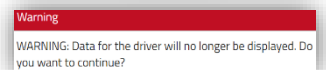
We **recommend not to delete drivers** from the system to **ensure any old data** is still **easily accessible** if required.

Only Delete a driver if you no longer require any of the data associated with the driver.

To **Delete a Driver** go to **Manage Site->Drivers.**

Search for the driver you want to delete, **Click on the Drivers Name** to open the **Driver Profile.**

At the **top of the page** will be a **delete option** to **remove the driver**, you will **receive a warning message** when **trying to delete a driver.**

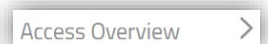


Only delete a driver if you **no longer require access to the data.**

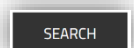
9. Checking Driver Access via Access Overview.

If a **driver is unable to access a machine** they might **not be assigned to the machine**, you can use the **Access Overview section** to **help identify what machines a driver is assigned to.**

To **Check Driver Access** go to **Manage Site->Access Overview.**



You can **search for a specific driver** or **click search** to **display all drivers.**



Once you have **completed a search** a **list of drivers will be displayed** as shown below.

If a **driver has a X next to a machine type** this means the **driver is assigned to some of those machines**, if this is **blank the driver isn't allocated to any of that type of machine**.
 If you **click on the [+]** icon below the **search button** this will **display some additional details**.
 In the **below example** we can see **Reach Trucks show 1/5** this would **indicate the driver is only assigned to 1 of 5 of the Reach Trucks**, normally if a **driver has a license for a type of truck** you could **assign them to all of the same type of trucks**.

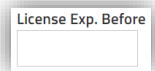
Driver	CBE	CBI	LOW	OTH	PIC	REA	
Example Driver		X		X		X	^
<ul style="list-style-type: none"> ■ PIN Code: 85967 ■ Profile: 1 ■ Additional Info 1: Warehouse Shift A ■ Additional Info 2: CBE,RT,ST ■ CBE - CB Electric: 0/1 ■ CBI - CB IC: 1/1 ■ LOW - Low Lifters: 0/2 ■ OTH - Other equipment: 1/7 ■ PIC - Order Pickers: 0/2 ■ REA - Reach Trucks: 1/5 ■ Site: LEICESTER WAREHOUSE ■ Postal Code: LE19 1WX ■ City: LEICESTER ■ Driver Licences: CBE Start: 11/11/2021 End: 11/11/2024 REA Start: 11/11/2019 End: 11/11/2022 							

Unless you want to **limit access** to only **certain machines within a department**, we would **recommend to add the driver to all trucks of that type if they have a license**.
 Just **in case you require a driver from one department to cover a driver from a different department**, this could **save you having to re-assign access to allow them to cover the driver**.

10. Checking for Expired Driver License Dates.

If **you are using driver license dates for your drivers** and **the driver has an expired license** the **system will restrict access to that type of truck**.
 To check to **see if any drivers have an expired license**, you can **use the License Exp. Before search option** in either of the following sections.

Manage Site->Machines or **Manage Site->Access Overview**



Add today's date in to the field and click search, this will then **display any drivers with an expired license date**.

Any **drivers with an expired license** will be **restricted access automatically by the system** if the **license has expired**.

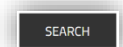
If you **click on the drivers name from the list**, it will **take you to the driver details page** where you can **adjust the license dates for the driver** if required.

11. Updating Driver License Dates.

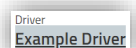
If you are **using driver license dates for your drivers**, they will **need to be updated once you have retrained a driver**.

If a **license expires for a driver**, the **driver will be restricted** from **using that type of machine**.

Go to Manage Site->Drivers and **Search for the driver you need to update**.



Click on the Drivers Name to **Open the Driver Details page**.



Go to the Driving License section and **Click on the Edit button**.



This will **open the Driving Licenses window** where you can **edit the license start and end dates**. If a driver's license expires the **system will restrict the drivers access** to that **type of machine**.

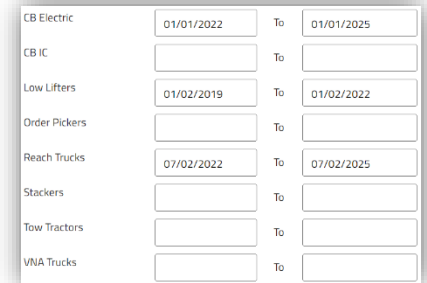
If the driver **has the same license start and end date to cover all trucks**, you can **tick the Same for All box** at the top to **apply the same license start and end date** to all types of trucks.



The screenshot shows a window titled "Driving License" with a red header. Below the header, there is a checkbox labeled "Same for all" which is checked. To the right of the checkbox are two date input fields: "01/05/2022" and "23/05/2025", separated by a "To" label.

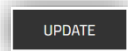
If you **have separate license start and end dates** for each machine family, you can **add each license start and end date separately to the list**.

If you **have specified separate license dates for machine families**, the system **will restrict access to all trucks from that machine family**.



The screenshot shows a window with a list of machine families and their corresponding license start and end dates. The families and dates are: CB Electric (01/01/2022 to 01/01/2025), CB IC (empty fields), Low Lifters (01/02/2019 to 01/02/2022), Order Pickers (empty fields), Reach Trucks (07/02/2022 to 07/02/2025), Stackers (empty fields), Tow Tractors (empty fields), and VNA Trucks (empty fields). Each row has a "To" label between the two date fields.

Once you have **added all license dates to the driver**, **Click OK** and then **Update the driver to save the changes**.



To **confirm which machine family applies to which trucks**. Go to **Manage Site->Machines** and **Search**.

This will **display a list of all the trucks on your site** and will **show the machine family next to each machine** listed.

	Machine	Fleet Number	Machine Family	Model	
<input type="checkbox"/>	 7FBEST15-18378		CBE - CB Electric	7FBEST15	▼
<input type="checkbox"/>	 6963768		PIC - Order Pickers	OSE120CB	
<input type="checkbox"/>	 6627779		STA - Stackers	HWE100	▼

12. Managing Driver Groups.

Driver groups can be used to **allow you to filter information** based off a **group of drivers**. These could be **used for filtering out email notifications** or **help comparing drivers from different departments** against each other.

You **can have unlimited groups** and **drivers can be allocated to multiple groups** if required.

So for example if **you have drivers who work in the Warehouse Department** and **work on the Day Shift**, you could **create a driver group called Warehouse Day Shift** and you could **assign all drivers who work in the Warehouse on the Day Shift** to the group.

This would **allow the Warehouse Day Shift Supervisor** to **use this group to filter down their notifications** to **just the members within the group**.

If you can **filter the relevant information to the correct users who need the information**, if they **receive an email from the I_Site system** this is **something they need to investigate**.

So **instead of the supervisor receiving notification for drivers who are working on a different shift**, they will **only receive notifications for drivers they are responsible for managing**.

To **view existing groups** or to **setup a new group**.

Go to **Manage Site->Driver Groups**



Click **Create Driver Group** to create a new group or **click on the group name** to open an existing group.

If **creating a new group** give the group a **title** and **description** to identify what the group is going to be used for, then **click Create** to setup the group.

Title	Warehouse Shift A
Description	All Warehouse Shift A Drivers
Site	LEICESTER WAREHOUSE LEICESTER

Any **drivers assigned to a group** will be **listed under the Drivers section** on the left side.

You will **see the drivers name, pin and additional info 1 details** for **each driver currently assigned to the machine**.

Driver	Pin	
<input type="checkbox"/> Leaver Example Driver	00107	Left the Business 17/02/2021
<input type="checkbox"/> Example Driver	85967	Warehouse Shift A

If you **want to remove a driver** from the group, **use the X button** next to the driver.

To **add a new drivers** to the group **click on the Add drivers button** to **open up the add driver window**.



You can **use the search options** to **filter down the list of drivers** or **search to display all drivers**.

Click the + button to add the driver to the group.

If you have **populated the Additional Info 1 field** with the **department and shift** for each driver you could use this to **filter the correct drivers to add to the group**.

This **can be useful for highlighting** if **incorrect drivers have been added to a group**.

If the **additional info relates to the group** you are adding drivers to this **can be a easy way to manage driver groups**.

Driver Groups can be used to filter down data within I_Site on any **driver related pages**, use the **Select Driver Group menu** to **select a group** to **filter down search results to just that group of drivers**.

Driver groups can also be used to filter email notifications, this can **allow managers or supervisors** to **only receive notifications from the drivers they are responsible for managing**.

A **single group or multiple groups** can be selected by using the **tickboxes** next to each group.

Driver Groups	1 selected
	<input checked="" type="checkbox"/> Check All <input type="checkbox"/> Uncheck All
Machine Groups	LEICESTER WAREHOUSE LEICESTER
	<input checked="" type="checkbox"/> I_Site Team
	<input type="checkbox"/> Leic Training Area
	<input type="checkbox"/> Night Shift