

CHECKLIST FORM

SMARTTRACK® GLOBAL USER GUIDE SELF-TRAINING CHECKLIST – SETTING UP SITES ON THE SMARTTRACK WEBSITE

Overview

This is the SmarTrack® Global User Guide *Self-Training Checklist* on the SmarTrack® website. Use this checklist together with the *SmarTrack Global User Guide* found under the *Help* section on the SmarTrack website.

Note

SmarTrack website access is required before starting. Contact your OEM to set this up, if required.

Start from the top of the checklist and work down in order. If a checklist item that is not optional cannot be completed, contact your OEM or SmarTrack Support.

When you log into the SmarTrack website, you will see the following categories:

- Dashboard ■ Fleet ■ Zoning ■ Help
- Reporting ■ Checklist ■ Administration

The following steps involve these categories. Follow them in the order they are presented.

(**Note:** Page # refers to the relevant pages in the *SmarTrack Global User Guide* manual M1179.pdf, downloadable from the SmarTrack website.)

Administration

No.	Item	Description	Checked	Page #
1	Help Section	Familiarisation with the Smartrack <i>Help</i> section on the website.	☐	13
2	User Listing	Add <i>Users</i> that require access to the SmarTrack website.	☐	13
3	Department Management	Add <i>Departments</i> , e.g., <i>Receiving</i> , <i>Despatch</i> , etc.	☐	14
4	Category Management	Add <i>Categories</i> , e.g., <i>Electric Reach Truck</i> , <i>Counterbalance IC</i> , etc.	☐	14
5	Access Control	[Optional] Add <i>Bypass Detection</i> .	☐	14
6	Checklist	[Optional] Enable this option: Enable <i>Out-of-Service</i> on critical question.	☐	15
7	Impact Configuration	[Optional] Enable <i>Out-of-Service</i> when machine has a critical impact.	☐	15
8	Out-of-Service Reasons	[Optional] Add <i>Out-of-Service</i> reasons	☐	16
9	Assign Out-of-Service Reasons	[Optional] Assign <i>Out-of-Service</i> reasons to <i>Categories</i> .	☐	16
10	Licence Expiry	[Optional] Enable both : Enable <i>Licence Expiry</i> , Enable <i>Permit Expiry</i>	☐	16
11	Excess Idle Configuration	[Optional] Set as 'No traction'.	☐	19
12	Battery Monitoring	[Optional] Enable battery monitoring and configure (may require machine wiring changes).	☐	21
13	Seat	[Optional] Enable <i>Seat</i> monitoring and configure (may require machine wiring changes).	☐	21
14	Seatbelt	[Optional] Enable <i>Seatbelt</i> monitoring and configure (may require machine wiring changes).	☐	22
15	Speed	[Optional] Enable <i>Speed</i> monitoring and configure (may require machine wiring changes).	☐	22
16	Load Weight	[Optional] Enable <i>Load Weight</i> monitoring and configure (may require machine wiring changes).	☐	22
17	Pedestrian Alert	[Optional] Enable <i>Pedestrian Alert</i> monitoring and configure (may require machine wiring changes).	☐	23

Checklist

No.	Item	Description	Checked	Page #
18	Question Management	Add all checklist questions for all machine types on site. <i>Questions must be easy to answer in Yes or No format and not be confusing. Add pre- and post-start questions.</i>	☐	27
19	Checklist Management	Select the <i>Category</i> and tick all relevant questions for this category, including full checklist questions plus questions asked when doing an operator change as well.	☐	27
20	Configuration Management	Enable: Either <i>Daily</i> or <i>Shift Start</i> for when <i>Checklists</i> are run. Enable: <i>Display</i> questions in random order? Set Day/Shift start times. Approximately five minutes before actual shift start time.	☐	28

Fleet

No.	Item	Description	Checked	Page #
21	Machine Management	Click the Edit button:  Fill out: <i>Fleet Number, Make/Model, and Notes.</i> Select: <i>Category, Department.</i> <i>Excess Idle Period</i> will be completed when following the guide, 'Auto-logoff on Excess Idle' in the <i>Help</i> section on the SmarTrack® website. Note: Complete the above for all machines on site. Check the subscription due date for each machine.	☐	31
22	Card Assistant	How to use <i>Card Assistant</i> to determine the correct pin code of non-SmarTrack-branded cards.	☐	35
23	Add Operator / Import Operator	Add operators to site. Complete all needed fields. Alternatively, under <i>Operator Import</i> , importing and exporting an operator .CSV file is possible.	☐	36
24	Machine Management	Assign <i>Operators</i> to machines, click  . ■ If selecting operators per machine, tick <i>Operators</i>, then . ■ If assigning all operators to that machine, click . Or you can assign operators to a machine by <i>Department</i> or <i>Category</i> .	☐	36
25	Disable Commissioning Code	Once all operators are assigned to every machine, disable the <i>Commissioning Code</i> .	☐	45
26	Message of the Day	[Optional] Set the <i>Message Of The Day</i> for each day. A custom message that you can set up to appear on the SmartTrack display each day.	☐	49
27	Impact Messages	[Optional] Set the <i>Impact Messages</i> . In the event of a medium or critical impact, the operator is alerted via a message on the SmartTrack display.	☐	49
28	License Messages	[Optional] Set the <i>License Messages</i> . A message that appears on the SmartTrack display when an operator signs in with a license due to expire/expired.	☐	49

Reporting

No.	Item	Description	Checked	Page #
29	Global Reporting	[Optional] How to use the <i>Global Reporting</i> feature. Global reporting is a graphical reporting feature with the ability to display data beyond a single site.	☐	53
30	Custom Reports	[Optional] How to use the <i>Custom Reports</i> feature. Custom reports are available either as summary or detailed reports. Detailed reports focus on a single piece of equipment, while summary reports cover multiple pieces of equipment.	☐	55
31	Email Alerts	[Optional] Add <i>Email Alerts</i> for each relevant alert. Email alerts provide site and fleet managers with rapid notification of an event when it occurs	☐	56
32	Email Reports	[Optional] Add <i>Email Reports</i> . Email reports are custom reports that can automatically be delivered via email daily, weekly, or monthly. The available reports are similar reports to those found in 'Custom Reports'.	☐	57
33	Checklist Report	[Optional] How to use the <i>Checklist Report</i> feature. A report on the checklists that were run on a particular date and machine.	☐	57
34	Machine Utilisation	[Optional] How to use the <i>Machine Utilisation</i> feature. A report on the utilisation of the machines on site	☐	59
35	Machine diagnostics	[Optional] How to use the <i>Machine Diagnostics</i> feature. Machine Diagnostics is used to view information about the SmarTrack® system's onsite.	☐	60
36	Commissioning Report	[Optional] How to use the <i>Commissioning Report</i> feature. A report on the commissioning information input on each machine onsite when last commissioned by a technician.	☐	60
37	Operator Licenses	[Optional] How to use the <i>Operator Licenses</i> feature. A list of operators and their license expiry dates (if applicable)	☐	61

Zoning

No.	Item	Description	Checked	Page #
38	Site Map Configuration	[Optional] Set <i>Site</i> location.	☐	65
39	Draw Zones	[Optional] Draw all zones needed. Follow the guide, ' <i>Zones – How to Draw Zones</i> ' in the <i>HELP</i> section on the SmarTrack website.	☐	69

Dashboard

No.	Item	Description	Checked	Page #
40	Dashboard	[Optional] How to use the <i>Dashboard</i> feature and how it can be personalised.	☐	77

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