



# CONTENTS

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<b>Getting Logged In</b> .....	Page 3	<b>Other Useful Reports</b> .....	Page 20
<b>Symbol Key</b> .....	Page 4	<b>Admin</b> .....	Page 22
<b>Main Screen Features</b> .....	Page 5	<b>Vehicle Admin</b> .....	Page 22
<b>Livetrack</b> .....	Page 5	<b>User Admin</b> .....	Page 22
<b>Mapping Tools</b> .....	Page 5	<b>Driver Admin</b> .....	Page 22
<b>Livetrack Items</b> .....	Page 6	<b>Schedule Admin</b> .....	Page 22
<b>POI's</b> .....	Page 7	<b>Livetrack Admin</b> .....	Page 23
<b>Current Weather</b> .....	Page 8	<b>POI Admin</b> .....	Page 24
<b>Actual Traffic</b> .....	Page 9	<b>Tools</b> .....	Page 25
<b>Traffic Events</b> .....	Page 10		
<b>Speed Limits</b> .....	Page 11		
<b>LBS</b> .....	Page 12		
<b>Summary Bar</b> .....	Page 13		
<b>Snail Trail</b> .....	Page 14		
<b>Tab Menu</b> .....	Page 16		
<b>Resource Viewer</b> .....	Page 16		
<b>Search</b> .....	Page 16		
<b>Livetrack</b> .....	Page 16		
<b>Alert</b> .....	Page 16		
<b>Summary</b> .....	Page 17		
<b>Report Wizard</b> .....	Page 18		
<b>Running Reports</b> .....	Page 18		

# GETTING LOGGED INTO INSIGHT



- To log in, simply visit the relevant web address URL:  
<https://insight.trakm8.net/>
- Insert your Username and Password then click on the login button, or press the enter key on the keyboard.

## Diagnosing Browser Issues

### Having problems when logging in?

- If you are having problems logging in, please contact our customer support team via email at [swiftsupport@trakm8.com](mailto:swiftsupport@trakm8.com) or call us on **0330 333 4124**

# SYMBOL KEY

## Menu Key



Refresh asset updates.



Minimise all, restore all open tabs.



Show/hide live snail trails.



Map settings, switch between street level and hybrid/aerial mapping.



Base Layers allow you to view, add and remove layers over the mapping.



Google Street View on/off.



Turns asset Labels on/off on the map. An asset label is the vehicle registration or fleet ID number.



In-Transit: The vehicles ignition is on and the vehicle is moving faster than 3mph.



Idling: The vehicle ignition is on and the vehicle is moving less than 3mph.



Parked: The vehicle ignition is off and the vehicle is not moving.



Group Ring: a coloured ring around the vehicle icon, corresponds to the colour assigned to their Livetrack collections.



Vehicles can be assigned to multiple collections, so the ring can be more than 1 colour

## Asset Key



This icon represents the start of a journey and would accompany the start location, time or both.



This represents the end of a journey.



This icon shows a speeding event occurred on the journey.



This icon shows an idling event occurred on the journey.



To view a snail trail on the map for that journey, simply select the map icon.



This icon simply shows the journey was a business journey.



These buttons move the report range forwards and backwards by one week/day/month.



Return to report wizard home.



Schedule this report.



Email this report.



Export the report to CSV file format.



Export the report to Excel.



Export the report to PDF.



Print Report.

Logout

Log out (you will be asked to confirm first).

# MAIN SCREEN FEATURES

Once logged in you will see the main map showing all vehicles in your Livetrack.

## Livetrack (1)

- This menu pops up on the left side of the screen once you are logged in and displays all of the collections that have been created. A collection is a “Display Group” of vehicles.
- The number of Livetrack collections you can create is unlimited.
- Vehicles can be added to 1 or more Livetrack collections simultaneously.
- You can map all Livetrack collections by clicking on the “Map All Livetrack Items” button. You can also select an individual vehicle or a group of vehicles by clicking on the relevant button within the list.

## Mapping Tools (2)

There are a number of features located on the right hand side of the map.

- **Zoom** – The plus and minus sign buttons can be used to zoom in and out of the mapping level. This can also be done using the scroll bar on your mouse (if it has one).
- **Base Layers** - There are 4 options for mapping overlays – Trakm8 Mapping, Open Street Mapping, Google Road Mapping and Google Hybrid Mapping. Click on the map you wish to display. Your selection is indicated by a tick on the left hand side of the Mapping Name. Base layers are determined by the preferences of the individual user.
- **Overlay Layers** - There are many layers you can add into the mapping features which are explained in more detail overleaf.

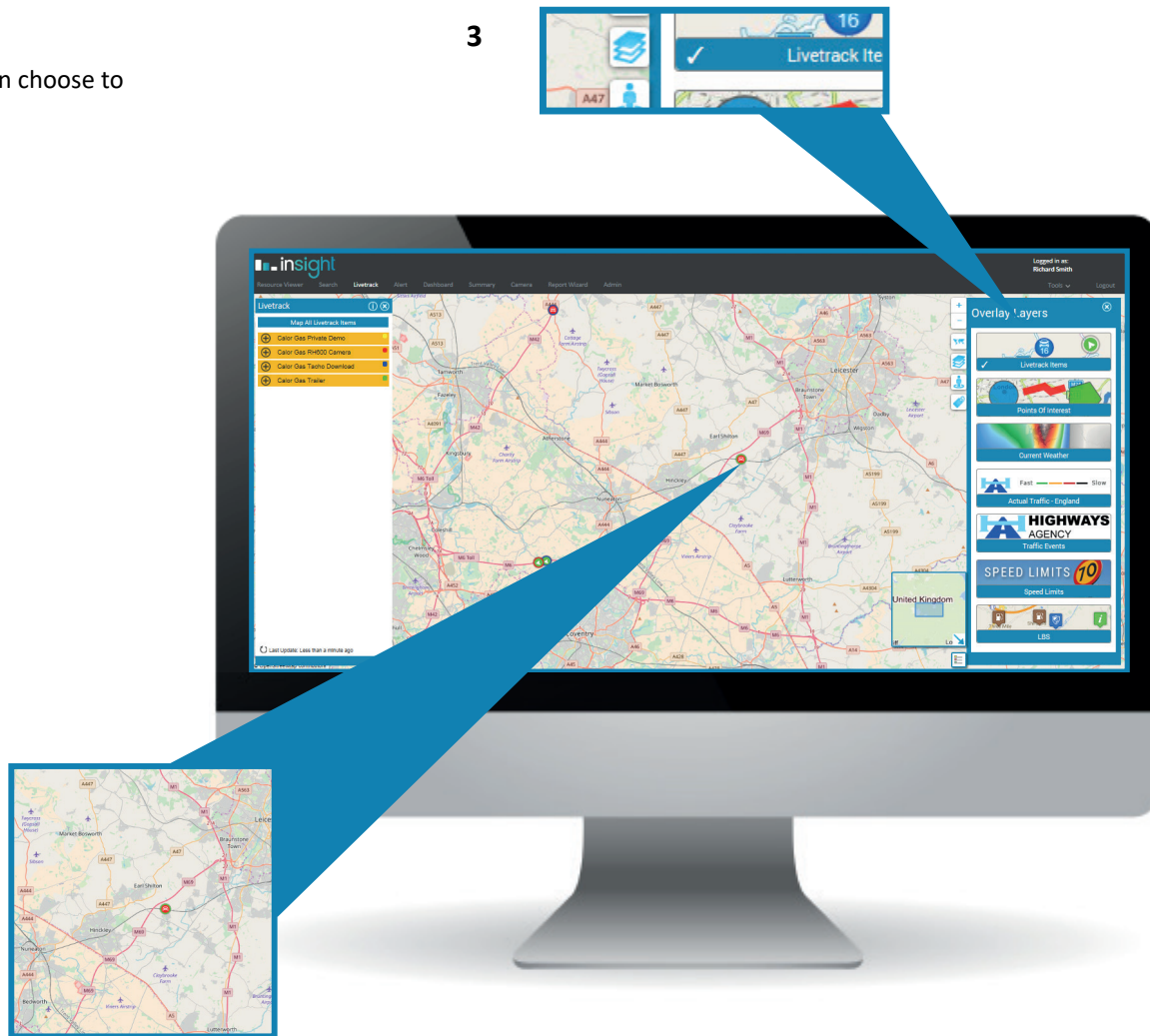
**Note:** Some features may not be available to all users. Permissions will depend on user type.



# LIVETRACK ITEMS

The Livetrack Items overlay is selected by default. If you wish to view the map without your Livetrack vehicles displayed you can deselect the overlay by a single left click.

Livetrack items are the vehicles which have been saved into your Livetrack. You can choose to view these vehicles on the map by selecting the Livetrack items overlay (3).



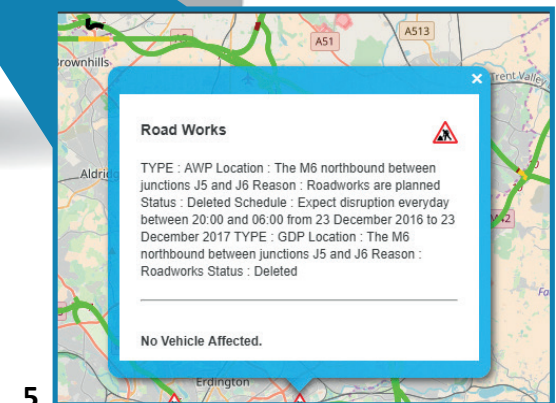
# POINTS OF INTEREST (POI)

Once you have searched for a location you can create a POI by right clicking and selecting “create POI here”.

Once a POI has been created, you can select this overlay layer to view them on a map (4).



When selected, your POI's will be displayed on the map and a single click over a POI will show the Add/Update POI menu (5).



# CURRENT WEATHER

You can view the current weather conditions on the map. If you select the Current Weather overlay the weather icons appear. You can click on a weather icon and it will display the location and weather information (7).

7





# ACTUAL TRAFFIC - ENGLAND

When you select the Actual Traffic overlay you will see the real time traffic speed of the roads (8).

If you click on the Layer Legend, you will see that each colour represents a road speed from fast to slow.

This is a live feed from the Highways Agency and can be used in conjunction with the Traffic Events overlay (9).

8



Layer legend

9

# TRAFFIC EVENT

When you select the Traffic Events overlay it will display in real time and current traffic events on the road (10).

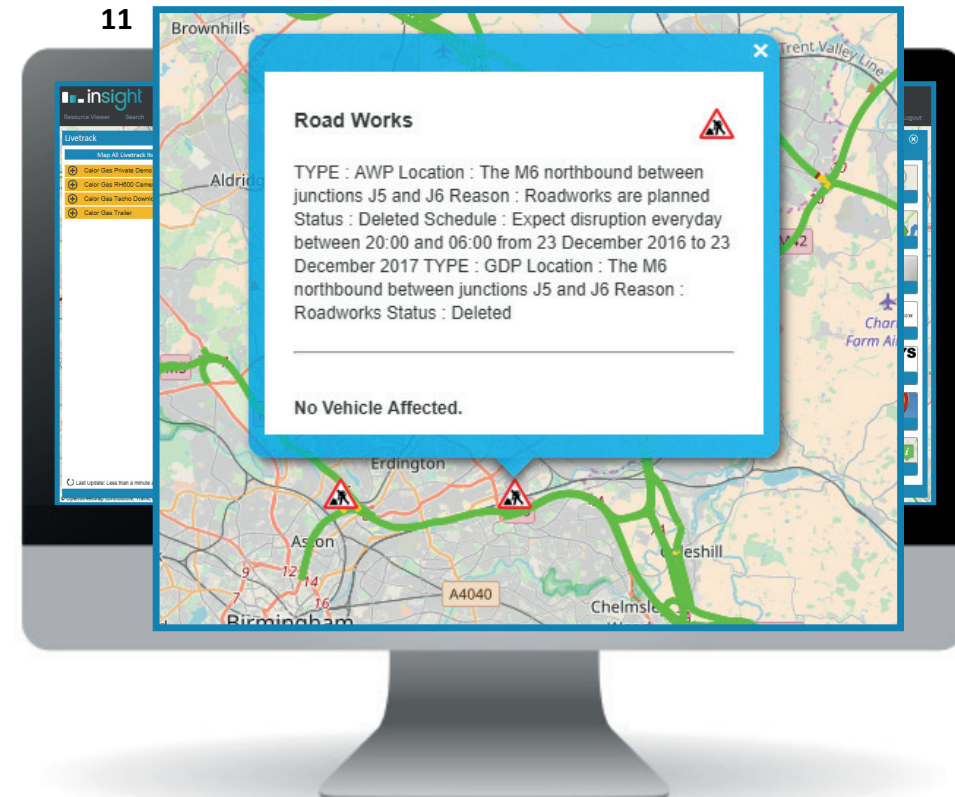
10



When you click on the Traffic Event Icon it will display a pop up window stating what the event is. It also lists which vehicles within your Livetrack will be effected.

A Traffic Event is displayed on the map with an icon. If you click on the Layer Legend, you will see what each icon represents. This is a live feed from the Highways Agency and can be used in conjunction with the actual traffic overlay (11).

11

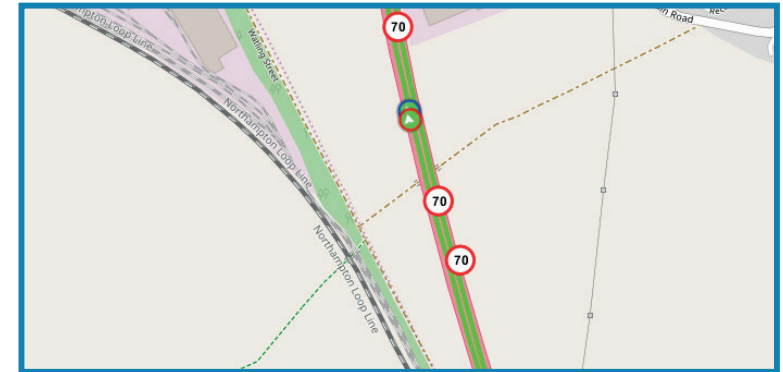


# SPEED LIMITS

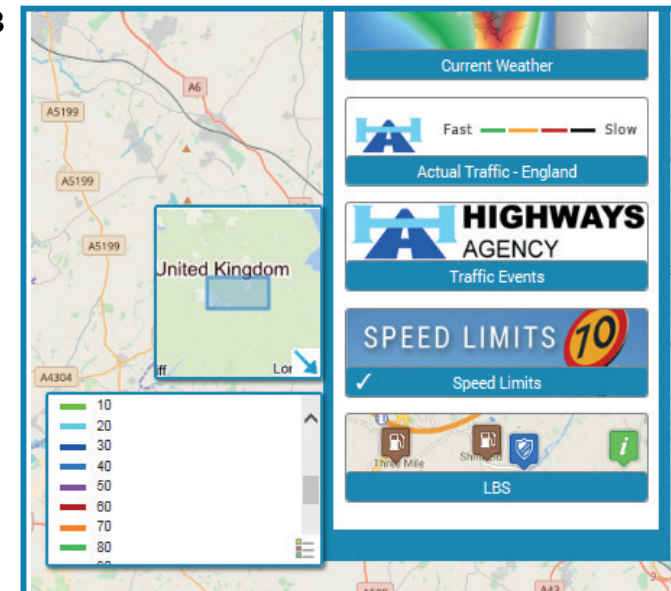
When you select the Speed Limits overlay and zoom into a suitable level, you will see the speed limit of each road displayed on the map. To see the speed limit, you will need to zoom in. This is so the map is clearer to read (**12**).

If you click on the speed limit icon it will automatically zoom in to show, via a coloured line, how much of that road is restricted to that speed. Each colour represents a speed limit and is explained in the layer legend (**13**).

12



13

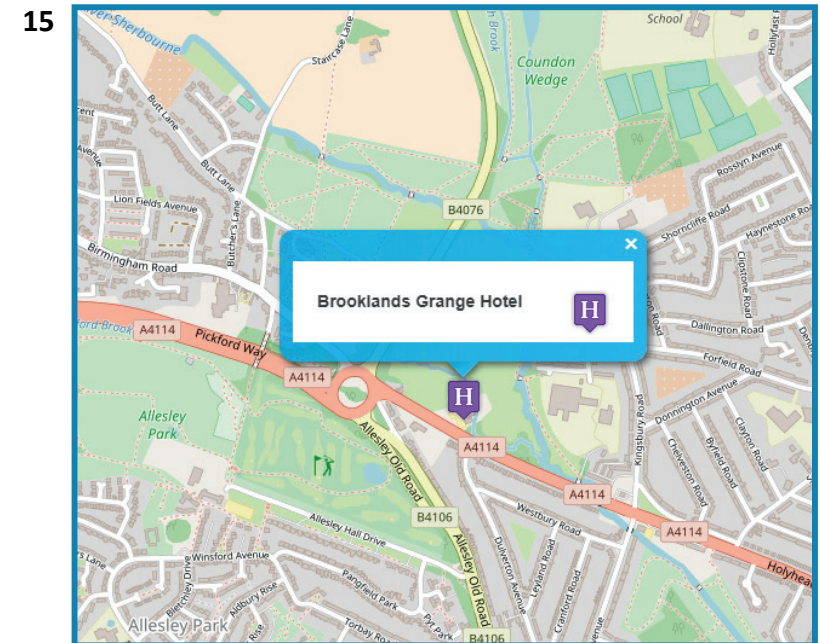
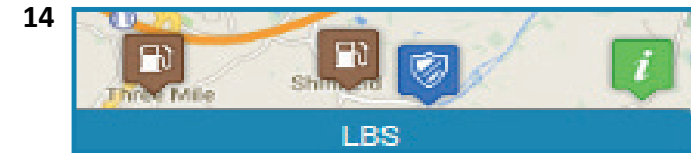


# LOCATION BASED SERVICES (LBS)

Location Based Services (LBS) is an overlay which displays nearby services such as car parks, hotels or public facilities (**14**).

Icons are displayed on the map with an image to represent the LBS. If you hover over an icon it will describe what it is (**15**).

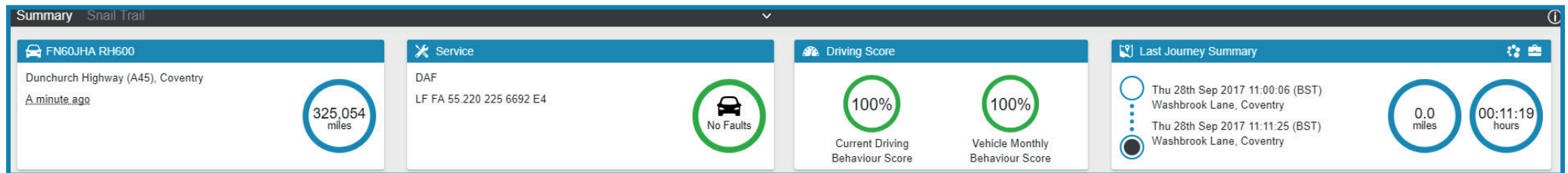
- **Google Street View** – this button splits the map into two and displays a google street view on the left hand side. The screen sizes are changeable by dragging the separator bar left or right.
- **Toggle Asset Labels** – this button allows you to show or hide asset labels on the mapping screen.
- There is a smaller map shown in the bottom right hand corner – this displays a higher level UK map to indicate a relative area. To close this view click on the arrow in the corner of the window.



# SUMMARY BAR

The Summary Bar is located at the foot of the main mapping screen. The bar can be opened and closed by clicking on the downward arrow (16).

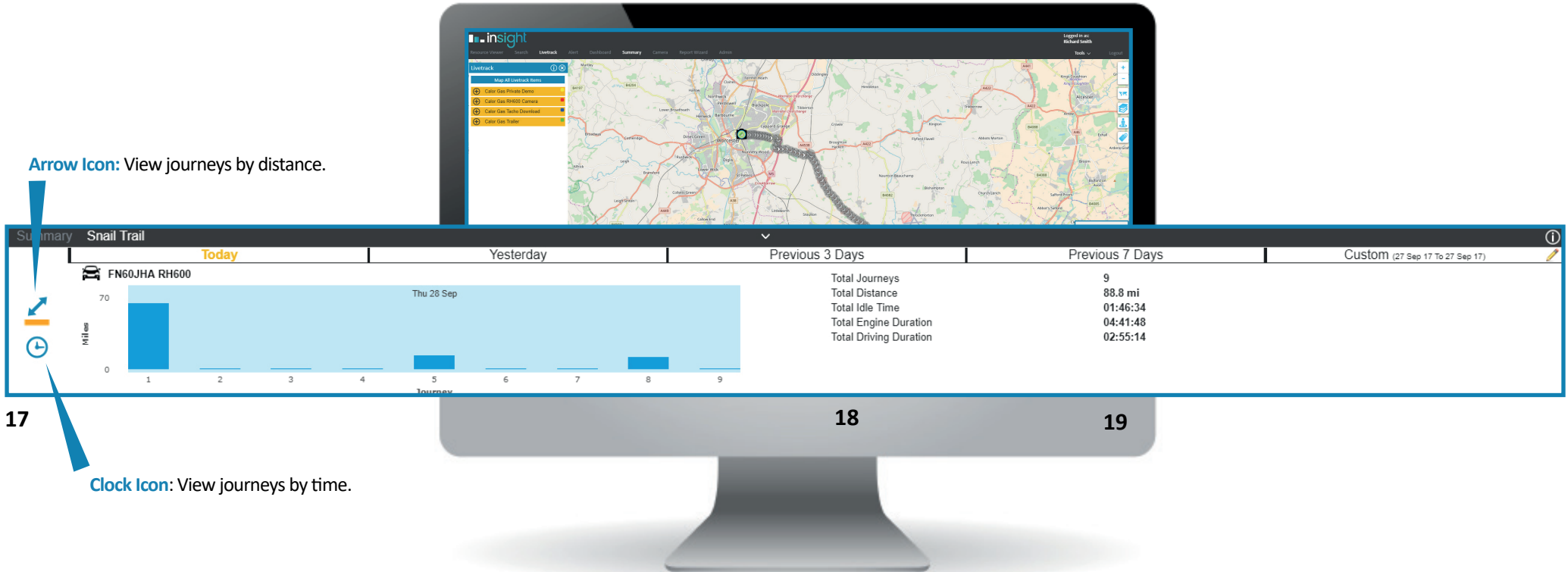
## 16



- As a default the summary bar displays the most recent journey details for a selected vehicle. To open the summary bar, simply click on a vehicle in the Livetrack menu. You can only open a summary bar for one vehicle at a time.
- The summary includes the start and end location, time of the journey, the vehicle and driver. Distance travelled, travelling time and journey type is also displayed. Speeding and idling events will also be visible where applicable.
- The summary bar allows you to select a pre-defined period or input custom dates for trip data retrieval. To select a customised data range, simply click the pen icon in the top right of the summary bar. Once the selected data has been retrieved you are able to view detailed trip information for the selected dates. The trips are summarised on the left hand side in a bar chart format.

# SNAIL TRAIL

- The Snail Trail is made up of logged GPS positions in a specific journey. When you click on the Snail Trail tab and select a specific journey on the left hand side, you can view the detailed breakdown on events for that trip. A snail trail of a journey is plotted on the map with driving behaviour events highlighted along the route. A more detailed graph is also produced detailing speeding events in red on the bar chart, and driver behaviour events along the bottom. Idling events are recorded after 2 minutes of engine idling.
- You can replay a trip using the play/stop buttons at the bottom.
- By using the Google Street View Button in conjunction with playback you can get a driver's eye view of the trip from start until finish.



**Arrow Icon:** View journeys by distance.

17

**Clock Icon:** View journeys by time.

17

You can view the journeys by distance or time.

18

18

Displays a summary of the journey for the selected time frame.

19

19

You can view the journeys over a set period of time, or a customised time range by using the pen icon in the top right of the summary bar.

# SNAIL TRAIL (cont.)

The screenshot displays the Insight software interface. At the top, the navigation menu includes Resource Viewer, Search, Livetrack, Alert, Dashboard, Summary, Camera, Report Wizard, and Admin. The user is logged in as Richard Smith. The main map shows a snail trail starting from Worcester and heading towards Pershore. A sidebar on the left lists Livetrack items: Calor Gas Private Demo, Calor Gas RH600 Camera, Calor Gas Tacho Download, and Calor Gas Trailer. Below the map, a summary for 'Snail Trail' is shown, with tabs for Today, Yesterday, Previous 3 Days, Previous 7 Days, and Custom (27 Sep 17 To 27 Sep 17). A detailed graph for journey FN60JHA RH600 on Wednesday, 27 Sep, is displayed. The graph shows speed in mph over 27 journeys, with a peak speed of 53 mph. The speed graph shows a series of bars representing speed variations over 27 journeys. The y-axis is labeled 'Speed mph' and ranges from 0 to 53. The x-axis is labeled 'Journey' and ranges from 1 to 27. The highest bar is at journey 24, reaching 53 mph. Other notable peaks are around 48 mph at journey 17 and 45 mph at journey 18. The speed generally fluctuates between 10 and 40 mph throughout the day.

## 20




Click a journey to see its' Snail Trail on the map with driver behaviour events highlighted. Hover over each Snail Trail update to view more information.

## 21

Once a journey has been selected, a detailed graph is displayed to show speed variations and driver behaviour events.

# TAB MENU

## Resource Viewer

The resource viewer shows all accessible folders within a person's login permissions. It will detail all vehicles , drivers  (if applicable) and all users  within a group or folder. The Resource view is primarily required to drive Administration functions in the Admin menu but can also be used as a data selection tool when generating and scheduling reports. Some users may not have access to this tool with permissions dependent on user type.

## Search

The search tab can be used to search for Groups, Vehicles/Assets, Users, Drivers, POI's, various Address parameters and even Co-ordinates. You can search the entire folder (of which you have permission to) or you can narrow by Collection.

## Livetrack

Livetrack is simply a way to display a group of vehicles or assets. A vehicle can exist in more than one group at a time and there is no limit to the amount of Livetrack collections you can create. If you use colours to identify your various collections then a vehicle will display the corresponding colour in a ring around the icon in the tracking screen and in the Livetrack collection menu.

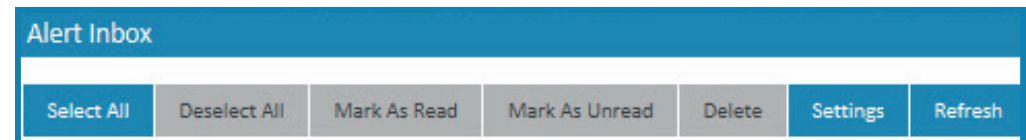
## Alert

Email and inbox alerts can be managed through the 'Alert' plugin on the bottom left of the main screen. Alerts can be created for the following Trakm8 Insight features :

**POI entry/exit** – this depends upon how you set the alerting options on the POI itself. You must have a POI set up to be able to receive alerts.

**Panic alerts** – there must be a business/private button fitted in the vehicle. Panic alerts are triggered in the vehicle by holding down the business/private button for at least 2 seconds.

**PTO Input** - reporting events such as beacons on/off or crane parked/in use. There must be a physical connection to the PTO in the vehicle.



**Choose to view Alerts through the Trakm8 Insight inbox or by email**



# TAB MENU (cont.)

**Vehicle Fault Codes (DTCs)** - provides details of any pending or stored faults that appear, possibly before an engine management light may even be illuminated in the vehicle.

- To set up the alerts you require, click on the 'Alert' plugin and then click 'Settings' at the top of the window.
- Tick either 'Email' or 'inbox' (this is your Trakm8 Insight alert inbox) to specify how you would like to receive the alert. You can tick both if required. If you tick 'Inbox' (Trakm8 Insight Alert) then you can also select a sound, to notify you of new alerts whilst you are logged into Trakm8 Insight.
- You can also chose the 'show popup' option with 'Inbox'.
- 'Show popup' will provide an instant on screen notification, of the last alert received and also details of how many unread alerts are in your inbox.
- 'Inbox' alerts can be viewed through the Trakm8 Insight 'Alert' Plugin screen. Email alerts will be sent as soon as the specified event is triggered by a vehicle. They will be sent to the users email address, which was entered, when your login was created.

Alert Settings					
Alert	Email	Alert Inbox	Show Popup	Play Sound	
Fault Code	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Door Opening ▼	🔔
PTO goes Low	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No Sound ▼	
PTO goes High	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Alarm ▼	🔔
POI Exit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No Sound ▼	
POI Enter	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No Sound ▼	
Button Alert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No Sound ▼	
Power Loss	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No Sound ▼	
Tow Away	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No Sound ▼	

Save Cancel

Manage your Popup Alerts in Settings

If you do not receive any email alerts after you have created them, please contact our customer support team on [admin@trakm8.co.uk](mailto:admin@trakm8.co.uk)

# REPORT WIZARD

## Running Reports through the Report Wizard

- All reports that are available within Trakm8 Insight fleet can be accessed through the Report Wizard plugin.
- The reports are categorised as Driver, Vehicle or Group reports which can be chosen from the dropdown menu within Livetrack.
- There will be a different number of format options that you can choose from depending upon the report you have selected. Options may include:
  - HTML (On Screen report)
  - PDF
  - Excel
  - CSV
- The report can be run over a vast selection of timescales, again depending on the chosen report, such as:
  - Today
  - Current Month
  - Yesterday
  - Previous Month
  - Current Week
  - Specify any date/time
  - Previous Week

**Report Wizard**

**Report**

Name: FN60JHA RH600

Choose Report: Vehicle Timesheet

Format: HTML

**Choose Timescale**

Timescale: Current Week

Specify Date

Start Time: 00:00:00      Mon 25 Sep 2017

End Time: 23:59:59      Thu 28 Sep 2017

# REPORT WIZARD (cont.)

- Reports can be run on collections, groups (including or excluding subgroups), or on individual vehicles/drivers/users. Use the resource viewer to select individual vehicles, drivers, users or groups that you wish to run the report on.

Alternatively you can select a collection or individual vehicle from your Livetrack.

- Some reports have a number of selectable filters, at the bottom of the window. These will auto adjust every time you select a new report, to only show what is available.

## Examples include:

- **Journey Type** – Select to view business journeys only/private journeys only or all journeys (default setting).
- **Minimum Speed** – Enable to only view journeys that are over a specified speed. Default is off (show all).
- **Minimum Distance Filter** – Enable to only view journeys that are over a specified mileage. Default is off (show all mileage).
- **Percent Overspeed Filter** – Choose what speeding events you want to see i.e. Only show Journeys 10% over the speed limit. Default is off (show all).
- **Out of Hours Filter** – Specify days/times for out of hours, then choose to view journeys within or outside this time only.

**Journey Type**

Journey Type All Journeys

**Minimum Speed Filter**

Enable  0 mph

**Minimum Total Distance Filter**

Enable  0

**Percent Overspeed Filter**

Enable  10 %

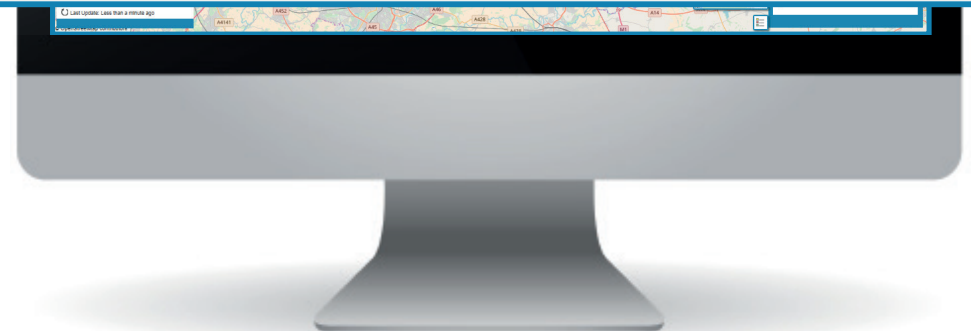
**Out Of Hours Filter**

Enable

Start Time 08:00:00 End Time 16:00:00

Mon
  Tue
  Wed
  Thu
  Fri
  Sat
  Sun

Within Time
  Outside Time

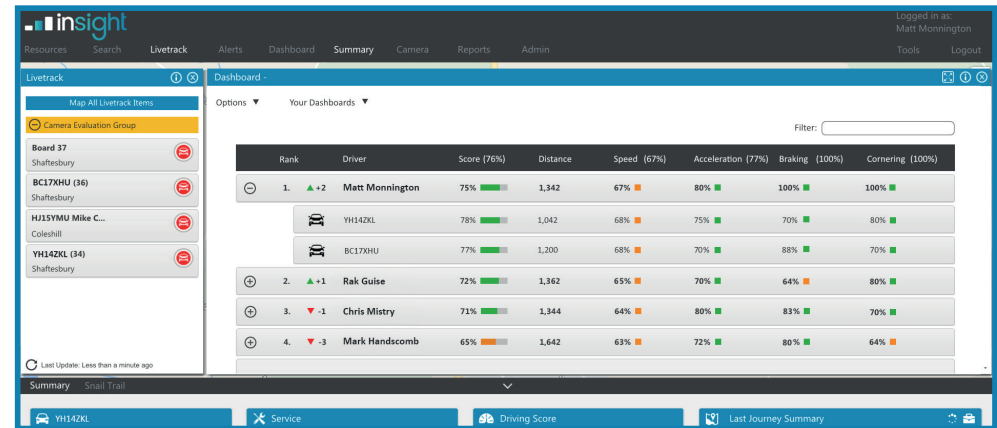


# OTHER USEFUL REPORTS

## Safety Report

The Safety Report is used to rank drivers by their driving behaviour. Drivers with the highest driver score and lowest risk are displayed at the top of the league table by default. Simply click the word 'score' in order to display the worst performing drivers at the top of the screen instead. The table can also be ranked in order of performance for specific driving behaviours. For example, by clicking 'Acceleration', the league table will be rearranged in order of each employees acceleration score.

By clicking the name of a driver, the table will expand to display the specific vehicles used by that driver and their driving scores within each vehicle. Alternatively, you can view the league table by vehicle score and click on each vehicle to view its drivers within your selected time period.



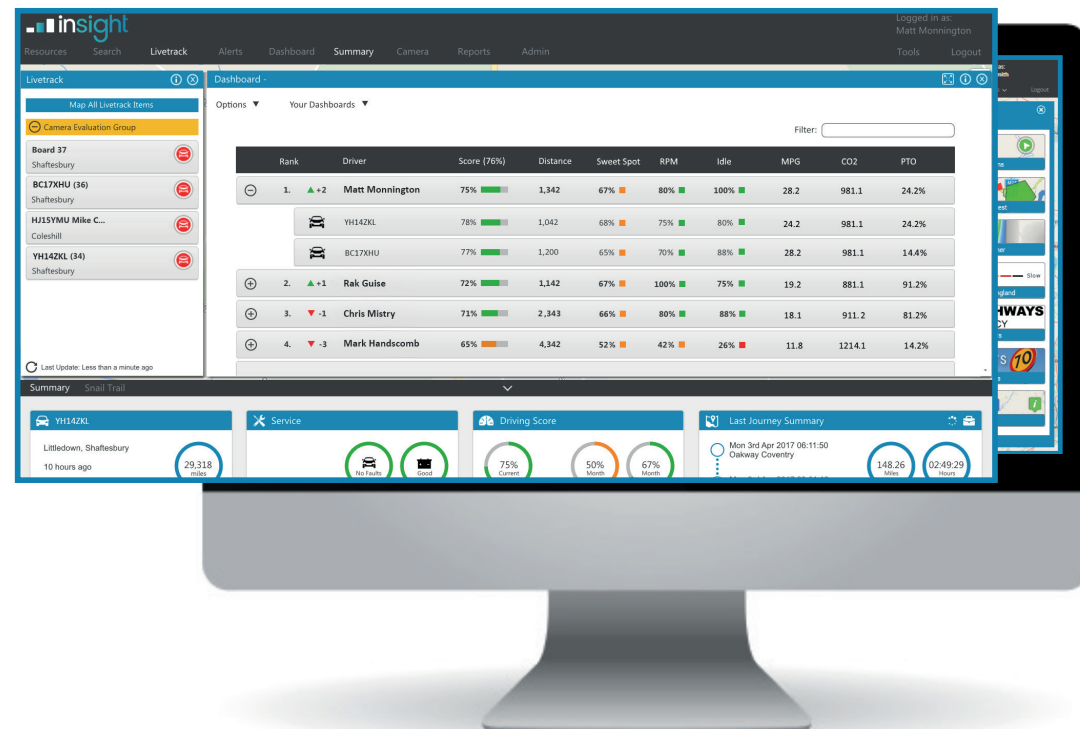
## Efficiency Report

The Efficiency Report displays each driver's efficiency scores and an overall score which combines Sweet spot, RPM and Idling time. By default, the report will display the most efficient driver within your selected time frame at the top of the league table. By clicking the word 'Score', the league table will flip to display the worst performing driver at the top.

The report also displays overall MPG, CO2 emissions and Power Take-Off (PTO) data for each driver or vehicle. The idling score considers the PTO data and is adjusted accordingly to represent only the idling time that is within your control.

You can also rank each driver by specific performance such as MPG score or CO2 emissions score by clicking the report. For example, when 'MPG' is clicked, the table will be rearranged to display the best performing driver based on their MPG score alone.

By clicking on each driver, you can view the efficiency score from each vehicle they have driven within your selected time frame. Alternatively, you can view the league table by vehicle efficiency score and click on each vehicle to view its drivers within your selected time period.



## OTHER USEFUL REPORTS (cont.)

There are a wide variety of reports available to choose from, some are used more often than others. To help get you started here are some suggested reports that are used the most:

Report Name	Report Type	Description
Vehicle Timesheet	Vehicle	Provides a daily summary of first journey start time/location and last journey end time/location. Includes daily and Weekly total journey/ driving/ idle times, total distance/ number of journeys and count of business/private journeys and distance for each type.
Driver Timesheet	Driver	Details as above, for a driver, regardless of number of vehicles driven in.
Odometer Report	Vehicle	Provides vehicle odometer readings for a specified date (current or historical)
Journey Summary (Events)	Vehicle	Provides street by street, or minute by minute details of each journey completed by a vehicle. Includes duration, distance, and POI entry/exit and Highlighted over speeding and idling. Click on the map icon for each journey to view the snail trail
Driver Journey Summary	Driver	Provides street by street detail of driver's individual journeys, including vehicle details and distance. Highlights speeding and idling events. Click on the map icon for each journey to view the snail trail
Vehicle Alert Report	Vehicle	Can be filtered to only report on specified alerts, such as Beacons, Crane, POI entry/exit or Panic
Where are my Vehicles	Vehicle	Will provide details and date/time of the last known location of your vehicles
Where are my Drivers	Driver	Will provide details and date/time of the last known vehicle driven and location of your Drivers
User Audit	User	Details login times/dates and any changes made by all of your current users

# ADMIN

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The Admin menu users with the correct permissions to manage vehicles, drivers and users as well as maintain existing POI's, report schedules and Livetrack collections. The basic admin menus are Vehicle, Driver and User.

## Vehicle Admin

The vehicle admin section allows you to view amend (if you have the correct permissions):

- Vehicle Details such as Reg, VIN, make, model
- Vehicle information such as Odometer and group
- Assign a default driver, primary location and owner
- Add Notes and update service/mot/tax data

## User Admin

The user admin section allows you to view amend (if you have the correct permissions):

- User Details such as full name, email address and phone number
- Login details such as username and password
- Manage user type, language, time-zone and units of measurement settings
- Manage details such as start of the week day, groups, currency
- Alerting functions

## How to edit an existing report

- In schedule admin click on the scheduled report you wish to edit, you can use the search bar to find it if required.
- Click on Edit at the top of the tab.
- Edit the format/timeframe/recipients/name as appropriate.
- Click ok. Your changes should be visible immediately and the next run date will reflect any timeframe amendments.

## Driver Admin

The driver admin section allows you to view amend (if you have the correct permissions):

- Driver Details such as first name and surname, address and phone number
- Manage Driver Tag and Tacho card numbers

The more complex admin sections are explained in more detail below.

### Schedule Admin

- The schedule admin allows you to delete and edit scheduled reports that you may have already set up.
- You can edit the recipients, timeframe, format, name and subject, allowing you and others to view reports without needing to log in.
- New reports are scheduled through the report wizard plugin.

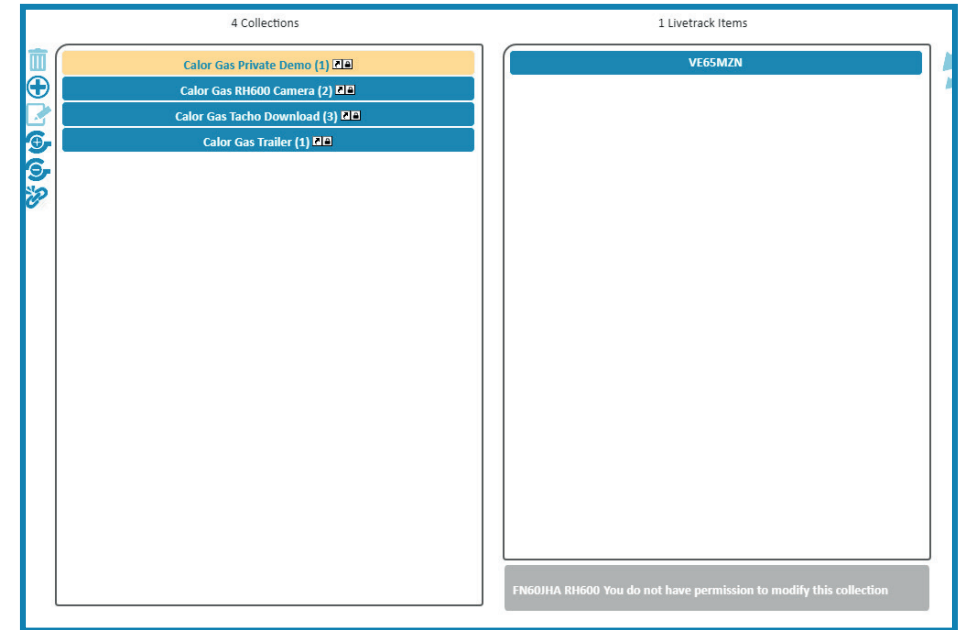
## How to delete an existing report

- In Schedule Admin click on the scheduled report you wish to edit. You can use the search bar to find it if required. If you wish to delete your entire scheduled reports click select all at the top of the tab.
- Click 'delete' which is also at the top of the tab.

# ADMIN (cont.)

## Livetrack Admin

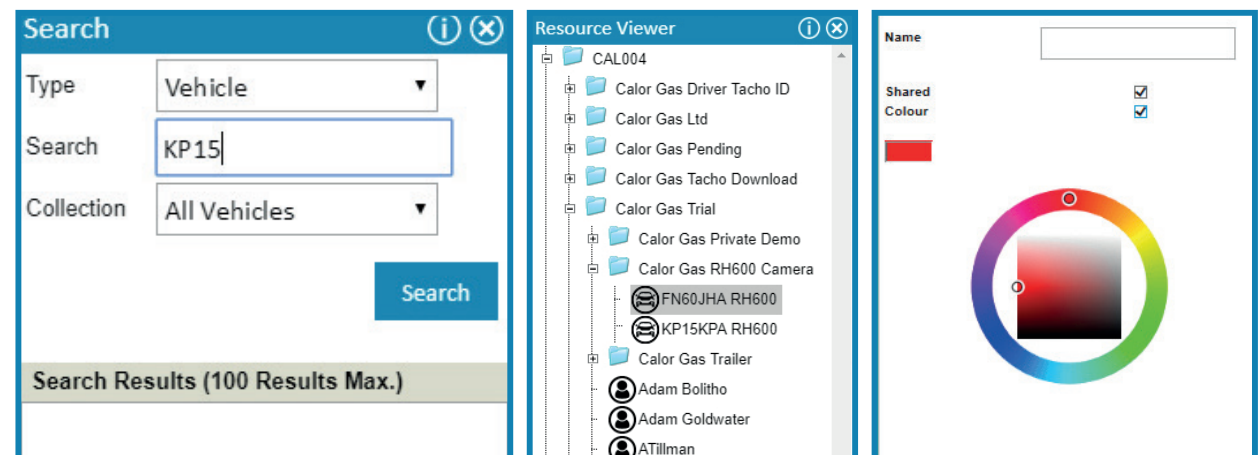
- The Livetrack admin tab allows you to edit, delete and create collections of vehicles from your fleet.
- These can then be used for your own personal reporting purposes, without effecting the fixed fleet hierarchy structure.
- Select the collection you wish to edit and use either the search or the resource viewer plugins, to find the vehicles or groups you wish to add. After selecting the required vehicle/group in the search/resource viewer plugin, click add vehicle or add group.
- The same vehicle can be added to more than one Livetrack collection.
- Select 'edit collection' to rename the collection, share it with other users or to assign it a new colour, this creates a coloured ring around each vehicle on the map, enabling you to quickly determine which group the vehicle belongs to.
- You can delete a whole collection or use 'remove resources' to delete 1 vehicle at a time.
- Add 'shared collection' allows you to search for and add other user's collections.



Click on the collection that you would like to edit

Search for vehicles/groups and then select from the resource viewer.

Edit existing collections.



# POI ADMIN

## Creating POI's

- A POI (Point of Interest) is a pre-defined geo-fenced area on the map that can be used to report on a vehicle entering or exiting any number of chosen locations. These could include Service stations, Fleet depots, Suppliers or Customer sites etc.
- A POI can be a circle of your chosen radius (Radius) or a custom shape (Polygon) or line (Polyline) of your choice.
- A polygon is very useful for accurately assigning depot boundaries and a polyline is best for assigned journeys along specific routes i.e. no entry roads.
- To create a single POI, right click on the desired location on the map, or use the search function to find it.
- Click the 'create a POI' symbol.
- Assign a name, colour, shape and size and Control visibility to other users using this feature.
- You are also able to add notes, add a URL, assign to a collection and set an alert for vehicles entering and/or exiting the POI.
- To Import multiple POI's use the POI admin tab which allows you to upload an unlimited number of POI's from a CSV file.
- You can also use the POI Admin tab to manage existing POI collections.

The screenshot displays the POI Admin interface. On the left, a map shows the Leicester area with a blue polygon highlighting a region. A context menu is open over the map, showing the location: "Harborough, Leicestershire, East Midlands, England, United Kingdom (@ QSM)". The menu includes options to "View Latitude & Longitude" and "Create POI Here". On the right, the "Add/Update POI" form is visible. It contains the following fields and options:

- Name:** A text input field.
- POI Type:** A dropdown menu set to "Yellow".
- Alerting:** A dropdown menu set to "Disabled".
- Select Collection:** A dropdown menu set to "{NEW COLLECTION}".
- URL:** A text input field.
- POI type:** Three radio button options: "Radius" (selected), "Polygon", and "Polyline".
- Visibility:** A dropdown menu set to "Me Only".
- Notes:** A text area for adding notes.
- Buttons:** "Launch Url", "Save", "Cancel", and "Delete POI".



# TOOLS

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In the Tools Menu you have a few options:

**Refresh** – Refreshes the screen

**Minimise All** – Minimises all windows currently open in the application

**Report A Bug** – Loads a message screen to allow you to send a message to Trakm8 Trakm8 Insight Web development team

**Find the Nearest Vehicle** – Allows you to select a point on the map and search for a nearest vehicle

**Show/Hide Live Snail Trails** – displays and removes the snail trails from the map view

**Log Out** - Click the Log Out button to exit the software or use the cross in the top right hand corner.

