Telematics Guru - Organisations

Set up and Functionality

Revision 1.0 - 4 July 2018

INTRODUCTION

This manual is intended to provide further detail on the structure, features and functionality of Organisations in Telematics Guru.

If you are starting out, it is recommended you work through the Telematics Guru - Getting Started guide.

1   USER LOGIN

The first thing that any User of the system must do is log in using their email address and password.

A User login is linked to one or more Organisations in the system. The Organisation a User is created within is their 'Home Organisation'

When a User logs in to the system they will automatically be taken to the Organisation that they are linked to.

If they are linked to multiple organisations they are required to select which Organisation to use in a second login step.
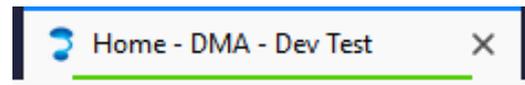
2 ORGANISATIONS

2.1 Organisation Display

The Organisation currently in use is displayed in the top right of the menu bar in the browser window.

It is also shown in the browser title bar.

2.2 Switching Organisations

A User that is linked to multiple accounts can easily switch to a different Organisation from the Account menu in the top right of the browser window.

Selecting "Switch Organisation" will take the user back to the 2nd step of the login process where they can select a different Organisation to log into.
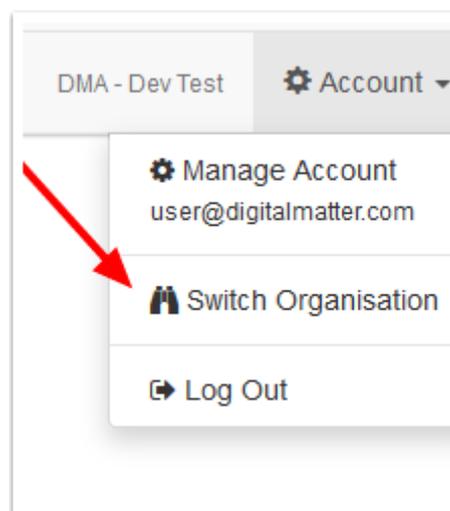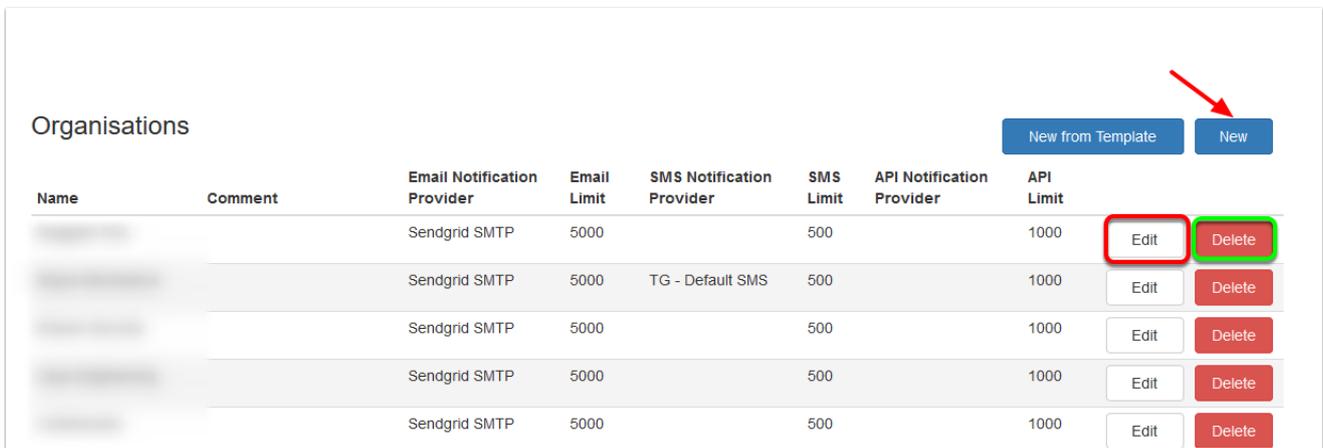
2.3   Creating Organisations

From the Admin menu select the "Organisations" item.

If you don't see this item in the Admin menu then you do not have the required permissions on your account to create Organisations – please contact Digital Matter to set this up for you.
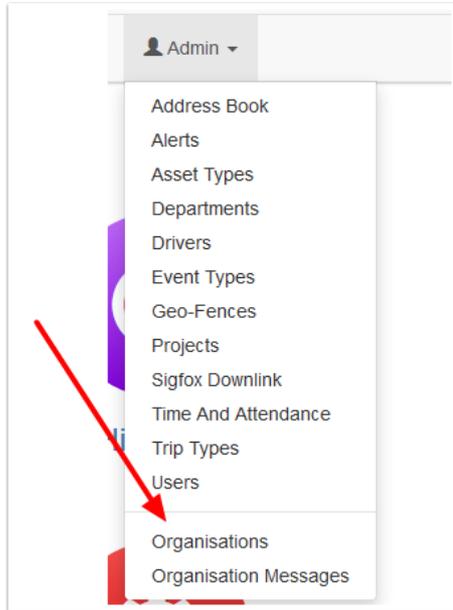
2.3.1   Organisation list

From the Organisation list you can create a new Organisation, or you can edit or delete an existing one.

2.3.2 Create a new organisation

2.3.3 Create a Name for the Organisation

2.3.3.1 Set the Organisation Type

Normal – for full TG functionality or **ALR (Asset Locate and Recover)** for a lower monthly fee. ALR provides no location history (just current) and a limited set of reports and alerts. Consult the ALR guide for more information.

2.3.3.2 Email Provider

This allows you to select the email provider to use to send emails for this Org. Select the default SendGrid SMTP provider unless you know what you're doing. There is no additional charge to use email notifications.

The monthly send limit restricts the number of emails that can be sent in a single month - as a sanity check and to prevent spam generation. Use the default unless Digital Matter tells you to use a different value.

2.3.3.3 SMS Provider

The system allows you to setup an Org to use SMS notifications if they are required.

NB - if using the default Digital Matter SMS Gateway then you will be charged per SMS sent, so make sure that this is understood and managed by you before enabling. Please contact Digital Matter to enquire about SMS charge rates.

As a Partner you can also set up your own SMS account with the SMS Gateway provider and manage the credits directly with them. This will give you a slightly better rate on the

SMS messages. The default limit is 500 SMS messages per month - you can adjust this up or down depending on what you believe to be appropriate for the Org.

Select the appropriate SMS Provider for your requirements.
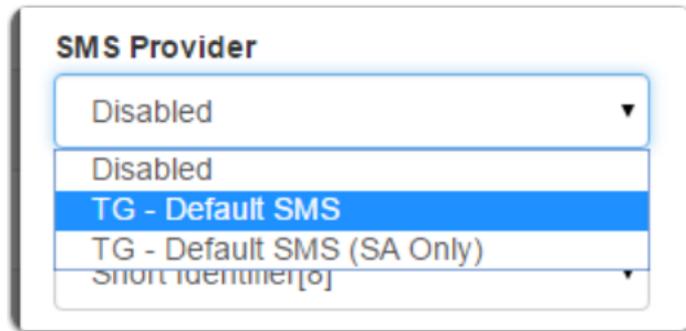
Select TG Default if you wish to use the TG API.

2.3.4 Reports

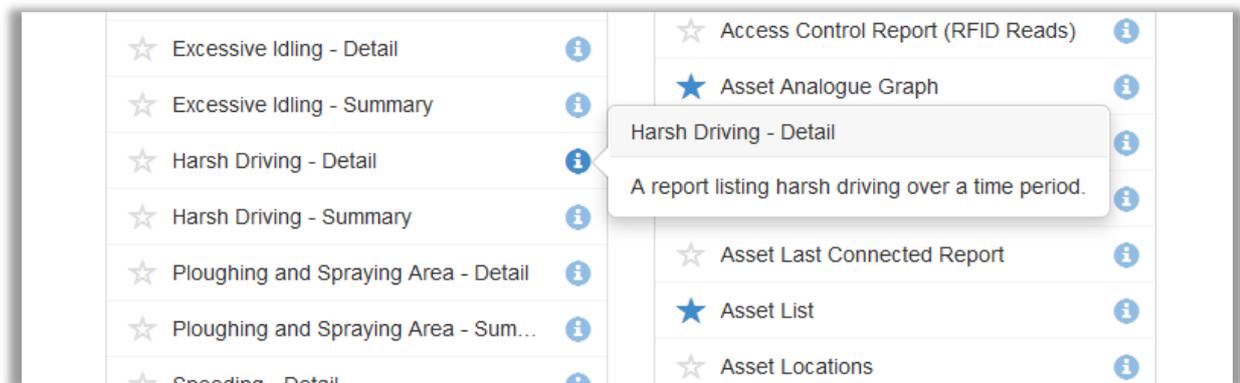Select the Reports tab, the system allows you to specific which Reports an Org has. Reports can be accessed from the Dashboard Icon or menu bar. Descriptions of each report are given below. Mousing over the information icon next to a report will provide a description within TG.

An effective way to understand what is contained in each report is to run the report to view what columns and data is generated.

2.3.5 Functionality

The system allows you to specify what functionality an Org has.

This allows us to keep the system user interface as simple as possible and tailored to their requirements. It also enables Partners to only need to provide support for functionality they are comfortable and/or experienced with.

For example, if a Customer (Organisation) does not use any form of Driver Identification then do not select this functionality from the list.

Some functions are currently unused or relate to discontinued products. They may not have been enabled for your Partner organisation by your DM branch. As such they will not appear in this list. These functions should not be enabled for now and are made note of in the list below.

Brief explanations of each function are given here. Detailed usage guides for system functions can be found at: support.digitalmatter.com.

2.3.5.1 Alerts and Notifications

Turn on the ability for the Org to create Alerts and Notifications. Alerts can be sent via email or text message and can also be used to create special Events in the Asset Timeline.

Set up an Alert Using the Wizard

Telematics Guru - Alerts

2.3.5.2 Asset Daily Coverage

This option turns on the ability for the Org to use the Asset Daily Coverage menu item. This allows them to view all trips for a day for selected assets on the map in assorted colours.

This is a good option for Organisations that need to see 'coverage' – for example waste collection trucks.
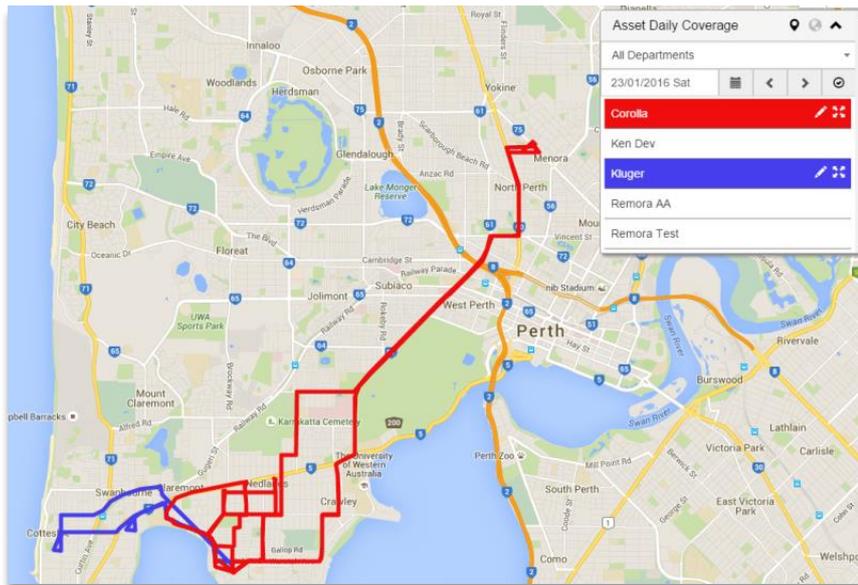
2.3.5.3   Asset Location Sharing

Select this to enable the links to asset locations to be shared by Organisations. Location sharing generates a link that will expire after a set time frame. No login is required to view the location of this Asset.
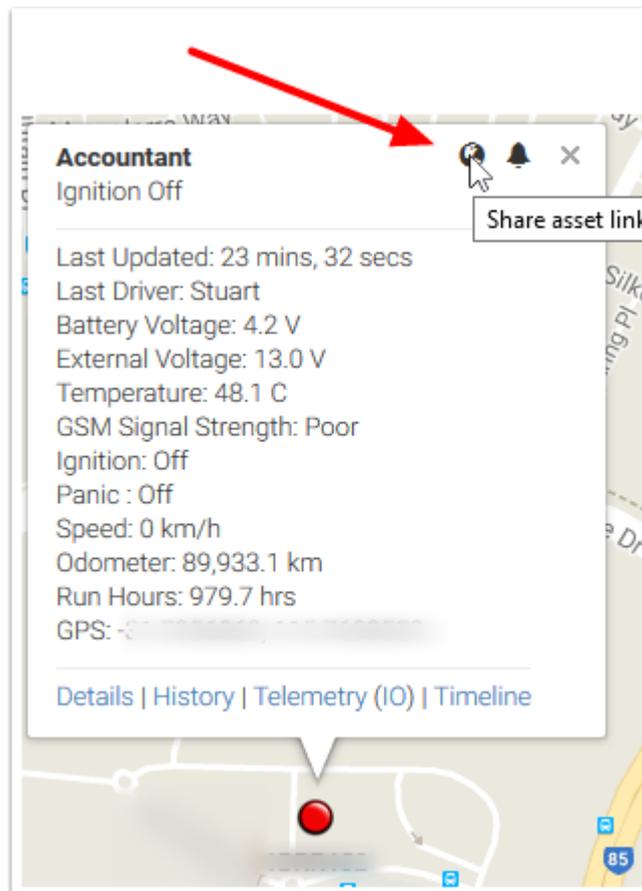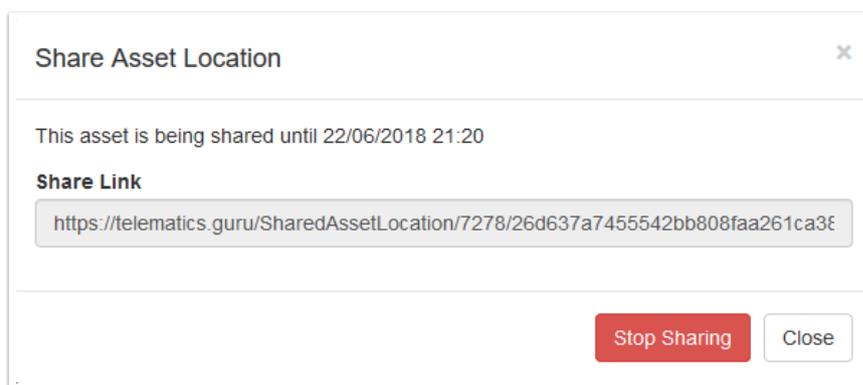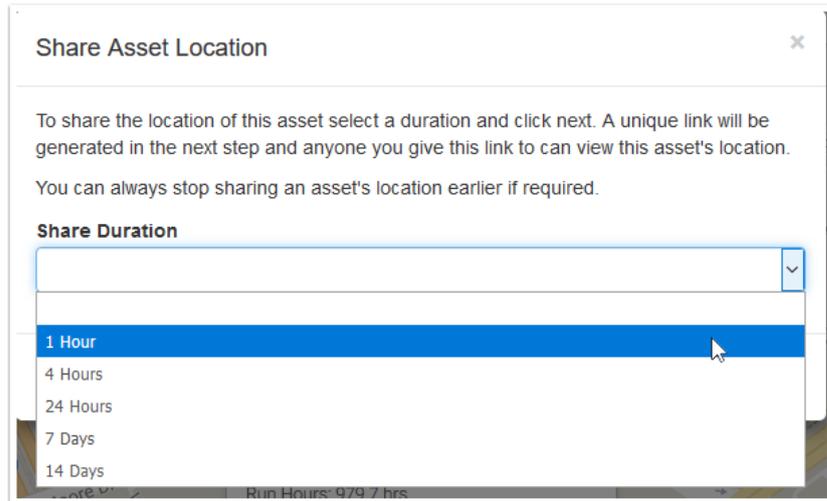
2.3.5.4 Asset State

Asset State allows an Organisation to setup digital inputs on their Assets to map into "State". Which combination of inputs are on or off will determine the state.

For example, a taxi company may have "Off Duty", "On Duty - Available" and "On Duty - In Fare" as 3 Asset States.

Asset States can be assigned colours, and the live view can be switched to a mode where the Assets show in coloured icons based on their current State.

Setup instructions here: Asset State Configuration Setup Guide

2.3.5.5 Billing

Do not enable this for now

2.3.5.6 Business Private Trips

Select this option if you want to allow the Org Users to be able to classify Trips as either "Business" or "Private"

2.3.5.7 Departments

Select this option if the Org will use Departments.

Departments are used for reporting purposes, enabling filtering of assets in the live view and reports.

Departments can be used to:

• assign an Asset to a Department

• assign a Driver to a Department

2.3.5.8 Disallow None Trip Types

"None" will not be able to be selected as a trip type.

2.3.5.9 Driver ID

Select this option if the Organisation uses Driver Identification in any form.

Driver ID Documentation

2.3.5.10 Duress

Enables panic/duress alerts. Special events can be set up to notify the TG user in the live view with a notification and sound warning.

Set-up Instructions

2.3.5.11 FMI Asset Dispatch

Do not enable this feature

2.3.5.12 Idle Time

Select this option if the Organisation is interested in seeing Idle Time for Assets in the Trip list.

This only makes sense if the Assets are installed using a wired ignition, as opposed to movement-based trips.

2.3.5.13 Iridium

Enable this if you are using Iridium devices with Telematics Guru.

Iridium Setup

2.3.5.14 Live Tracking

Select this to enable the live tracking view for the Org.

2.3.5.15 Local Speed

Enables speed by road for assets on the TG-PRO plan. At the end of trips local speed limits are looked up, enabling reports for speeding violations.

Speed Monitoring in Telematics Guru

2.3.5.16 Point History

Enables the "Point History Map View" for assets which are non-trip-based. Each heartbeat and position will be displayed on the map.

2.3.5.17 Projects

Select this option to enable Projects for the Org.

Projects allow a User to create a list of Projects, and then to assign Assets to Projects.

You can also assign individual Trips to Projects.

Projects are typically used to allocate Assets and their usage for monitoring and invoicing to clients. Reports can be run filtered by Project.

2.3.5.18 Scheduled Maintenance SMR

Enables Scheduled Maintenance and Reminders. Schedules can be created based on run hours/odometer reading and reminders and jobs created.

SMR Manual

2.3.5.19 Scheduled Reports

Select this to allow the Org to set up scheduled reports. This allows reports to be run periodically and emailed to recipients.

2.3.5.20 Secondary Run Hours

Select this option to enable Secondary Run Hours for an Org.

The Secondary Run Hours allows a digital input on an asset to be used as a Run Hour meter for a second system or item on the Asset. For example you may want to monitor the run hours of a PTO or a compressor. The Secondary Run Hours can also be used in the Scheduled Maintenance and Reminders (SMR) module to schedule maintenance jobs.

2.3.5.21 Show Asset Coordinates

Select this option to show the latitude and longitude in the popup window for an asset on the Live view. Useful if you need to know the actual GPS coordinates.

2.3.5.22 Show Driver Name on Live Tracking

If a Driver ID has been entered at the beginning of an Asset's trip, this Driver will be shown in the details on the Live Tracking View

2.3.5.23 Tagged Assets

Do not enable this for now

2.3.5.24 Tags

Do not enable this for now

2.3.5.25 Telemetry

Select this to allow the Org to access the telemetry view for the 'raw' data coming in to the system.

2.3.5.26 Time and Attendance

Do not enable this unless you are using the DM Console (discontinued product)

2.3.5.27 Time and Attendance Variable Shifts

Do not enable this unless you are using the DM Console (discontinued product)

2.3.5.28 Trip Comment

Select this to allow the Org to add comments to trips.

This is typically required if Organisations are keeping some form of tax logbook and they need to capture a reason for the trip.

2.3.5.29 Trip History View

Enables the Trip History Map View for the Organisation

2.3.5.30 Trip Types

Select this to allow an Org to specify Trip Types for Trips. This is additional classification of Trips beyond Business / Private and can be useful for recording the purpose of the Trip.