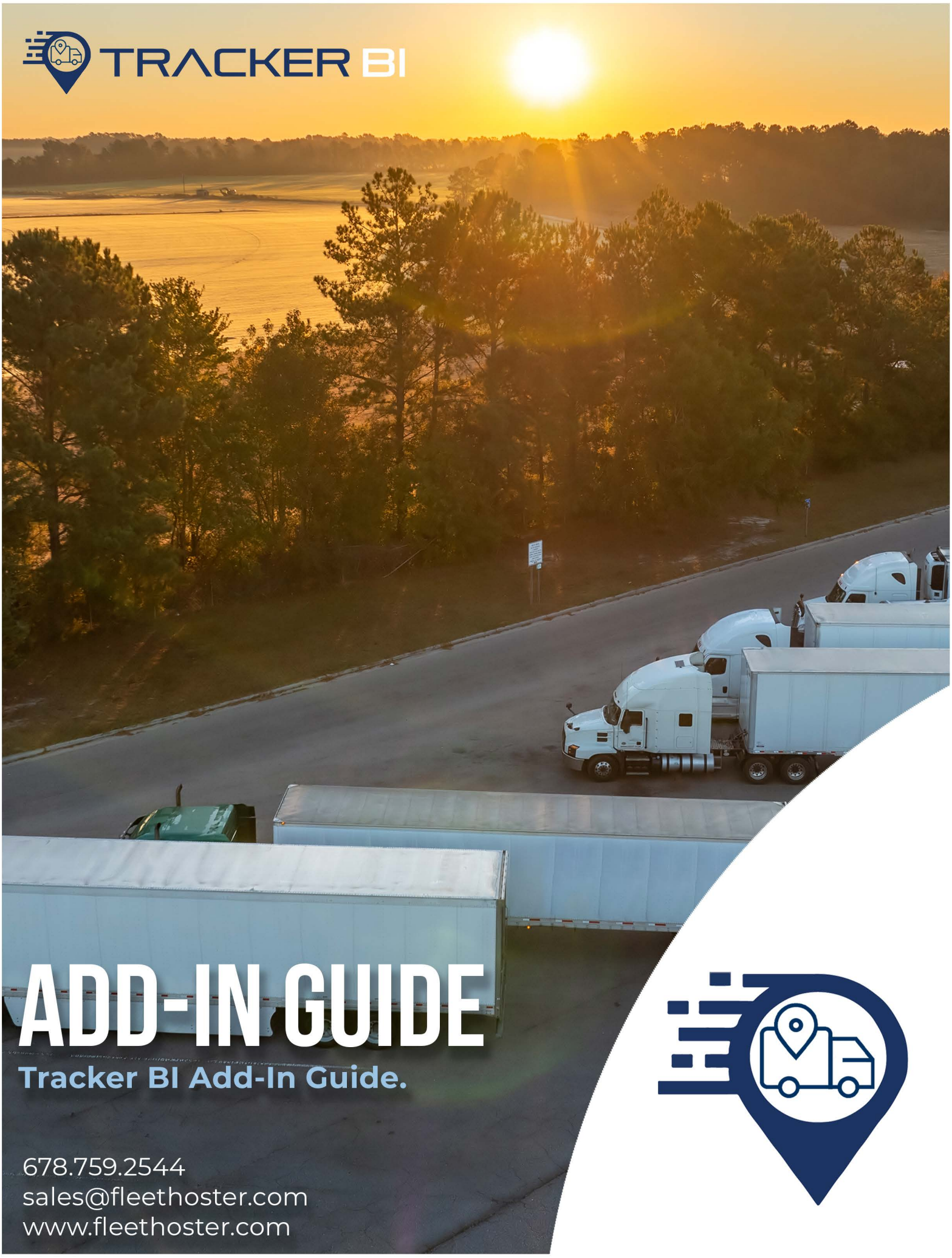


ADD-IN GUIDE

Tracker BI Add-In Guide.

678.759.2544
sales@fleethoster.com
www.fleethoster.com

Tracker BI Add-In Process

- The FH Support Manager will need to be added to the database that the trackers will be associated with
    - **Customer to grant FH Support Manager initial access**
    - FH Support will add the Tracker BI API and Support User
    - FH Support will associate the database with the trackers
    - FH Support User will utilize this naming convention: fleetsupport_databasname@trackerbi.com
- The Tracker BI Add-In will need to be added:
    - FH Support will install and complete this step
    - Go to System Settings - Add-In and then paste the code below:

Tracker BI Add-In Code


```
{
        "name": "Tracker BI",
        "supportEmail": "support@fleethoster.com",
        "version": "1.0",
        "items": [
    {
        "url": "https://api-st-service-na.azurewebsites.net/appsetting/getfile?name=index.html&app=assettracker",
        "path": "Add-ins/",
        "category": "ProductivityId",
        "menuName": {
        "en": "Tracker BI"
        },
        "svgIcon": "https://api-st-service-na.azurewebsites.net/appsetting/getfile?name=icon.svg&app=assettracker",
        "icon": "https://api-st-service-na.azurewebsites.net/appsetting/getfile?name=icon.svg&app=assettracker"
    },
    {
```

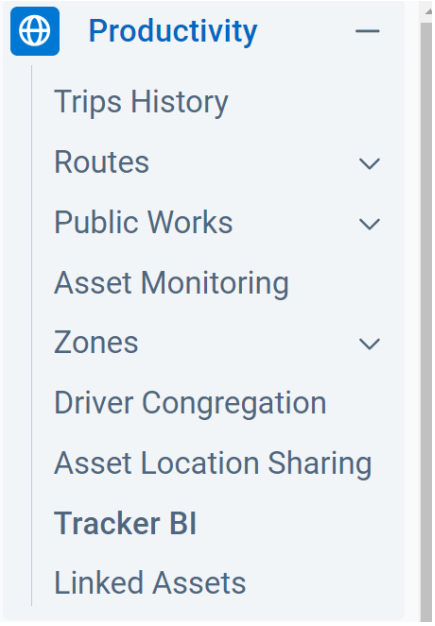
```
            "page": "map",
            "title": "ColdChain BI",
            "noView": false,
            "mapScript": {
            "url": "https://api-st-service-na.azurewebsites.net/appsetting/getfile?name=index.html&app=assettracker/map-addin"
            }
        },
        {
            "page": "tripsHistory",
            "title": "ColdChain BI",
            "noView": false,
            "mapScript": {
            "url": "https://api-st-service-na.azurewebsites.net/appsetting/getfile?name=index.html&app=assettracker/trip-addin"
            }
        }
    ],
            "isSigned": false
}
```

TRACKER BI
WHERE TRACKING MEETS INTELLIGENCE

Accessing Tracker BI and ColdChain BI

Please ensure that the Tracker BI add-in is installed.

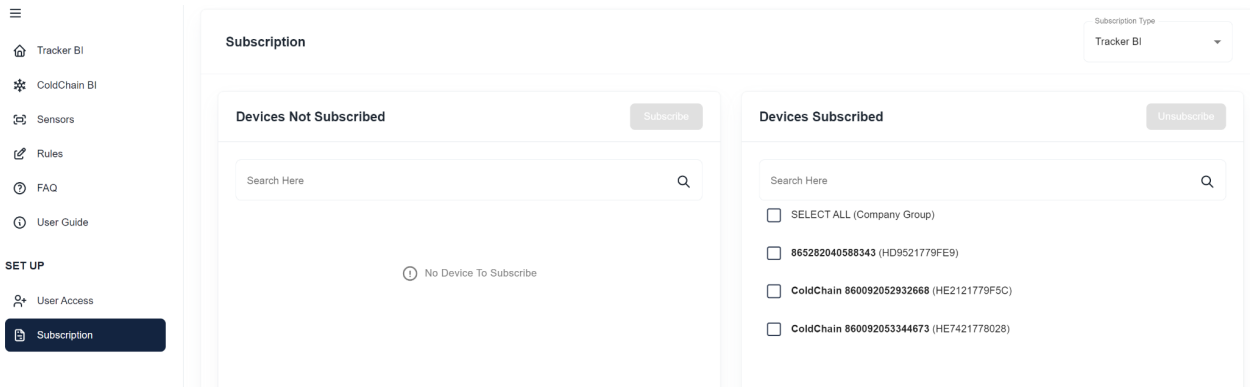
In order to access Tracker BI, click ***Productivity***, then ***Tracker BI.***



Subscribing trackers to Tracker BI and ColdChain BI

For trackers to utilize the features of Tracker BI, they must be subscribed to Tracker BI.

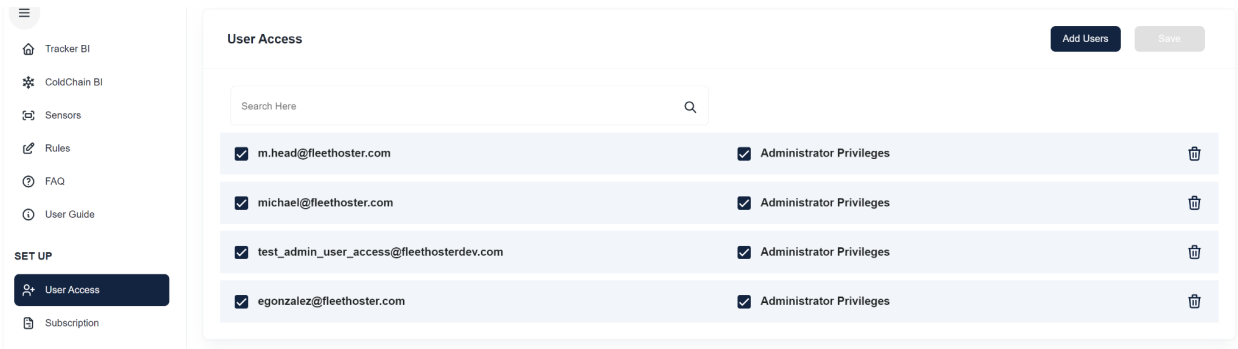
a. Click ***Subscription***
b. Under the Subscription Type, click the drop down arrow to switch between Tracker BI and ColdChain BI
c. Under Devices Not Subscribed, select the trackers you would like to subscribe by checking the box next to the tracker's IMEI, then click ***Subscribe***. To subscribe all cameras at once, check the box next to ***SELECT ALL***. If at any point you would like to unsubscribe a tracker, check the box next to that tracker in the Devices Subscribed column and click ***Unsubscribe***.



Setting up User Access for Tracker BI and ColdChain BI

This grants users the ability to access Tracker BI and Coldchain BI. Users must already have access to the Geotab database in order to gain access to Tracker BI and ColdChain BI.

a. Under Set up, click ***User Access***
b. Click ***Add Users***
c. Type in the search bar to add the User to ***Tracker BI and Coldchain BI***
d. Check the box next to the user that needs access
e. To grant Administrator Privileges, check the box next to Administrator Privileges. Users with Administrator Privileges have full application access including the ability to edit rules, add profiles, and edit profiles, while users without administrator privileges can view only

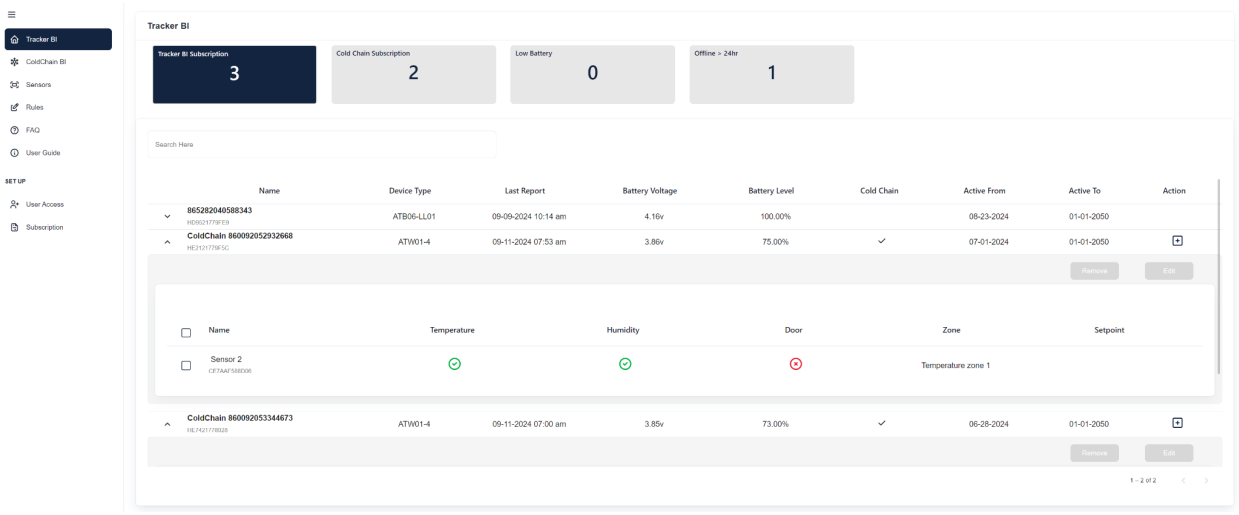


Tracker BI Dashboard

This dashboard displays a variety of data for tracking devices sorted by date range and different categories.

a. To view the devices in each category, simply click on the square labeled with the respective category
b. To view the details of each device, click the drop down arrow next to the desired device
c. To add the temperature Setpoint, check the box next to the sensor and click Edit and type in your desired Setpoint, do not change the Zone that has been pre-set

d. To assign a sensor to a tracker, click the + under the Action column
e. To edit or remove a device, click the drop down arrow to the left of the device, click the squares next to the devices, and click **Edit** or **Remove**



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COLDCHAINBI

ColdChain BI Dashboard

This dashboard displays a variety of data for temperature sensor devices sorted by date range and different categories.

a. To view the devices in each category, click on the square labeled with the corresponding category
b. To view the details of each device, click the drop down arrow next to the desired device
c. To switch between current and past data, click the drop down under Data Type
d. To export the data, click ***Export***
e. To pause the reporting of sensors if they will not be in use, toggle the switch under Monitoring
f. To view the history of your devices, click the history icon under History
    i. To change the time range displayed, click the calendar icon in the top right and select the time range you would like to see
    ii. To zoom in on the Data History of Trips History graph, highlight the portion of the chart you would like to zoom in on by dragging the cursor across it
    iii. To export the Data History, click the three lines labeled Menu

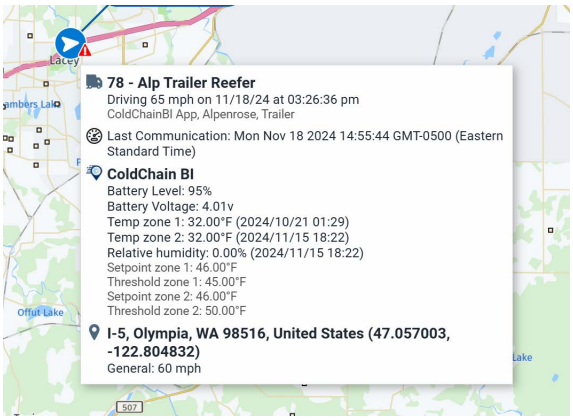
ColdChain BI on the Map

You can utilize the map to quickly check the temperature status of your sensor.

a. Click on the Map

b. Locate the tracker that you want to view the temperature of

c. Hover your cursor over the tracker and the drop down will show you a synopsis of your trackers status



ColdChain Sensors

This section allows you to add new temperature sensors and verify if they comply with your set rules.

a. Under the menu, click ***Sensors***

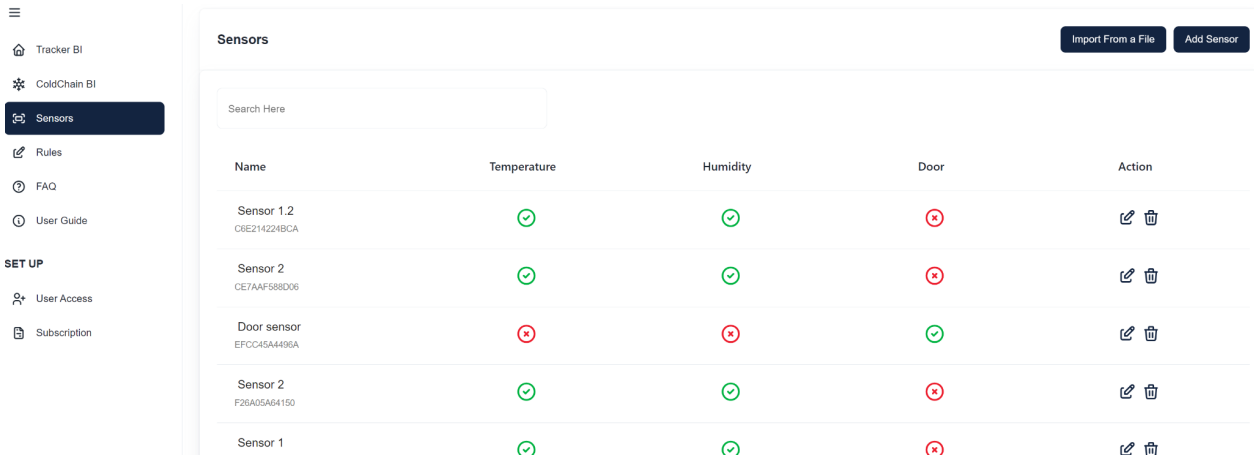
b. All sensors will be listed by name with their M.A.C ID and their Temperature and Humidity compliance and if it is a door sensor

c. To add a sensor click ***Add Sensor*** and fill out the parameters accordingly

d. To add sensors in bulk, click ***Import From a File*** and import a CSV file

e. To delete a sensor, click the trash icon under Action

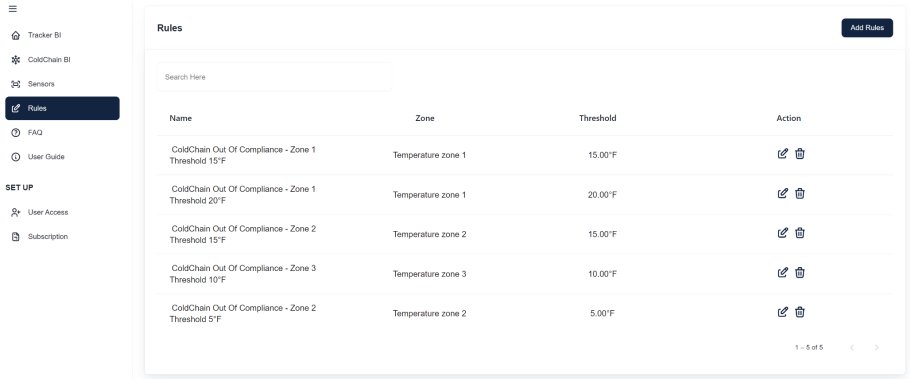
f. To edit a sensor, click the pen and paper icon under Action

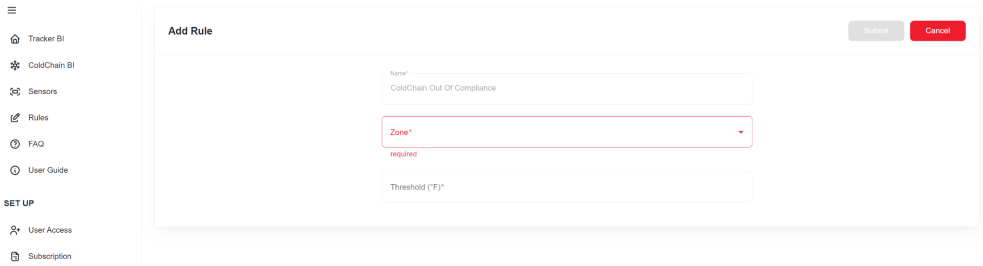


Setting up Tracker Rules

This will allow you to set temperature thresholds.

a. Under the menu, click ***Rule***
b. To add a rule, click ***Add Rules***
c. Pick the Zone that you need the rule to apply to
d. Set a threshold, this represents the number of degrees the sensor can deviate from the set point before it is considered out of compliance
e. Click Submit
f. To edit a rule, click the edit icon to the right of the rule
g. To delete a rule, click the delete icon to the right of the rule

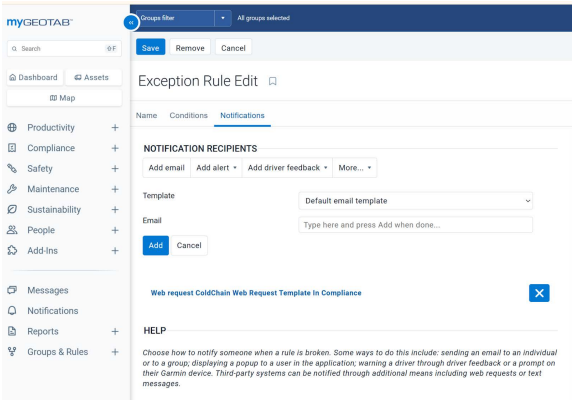




Setting up Email Notifications

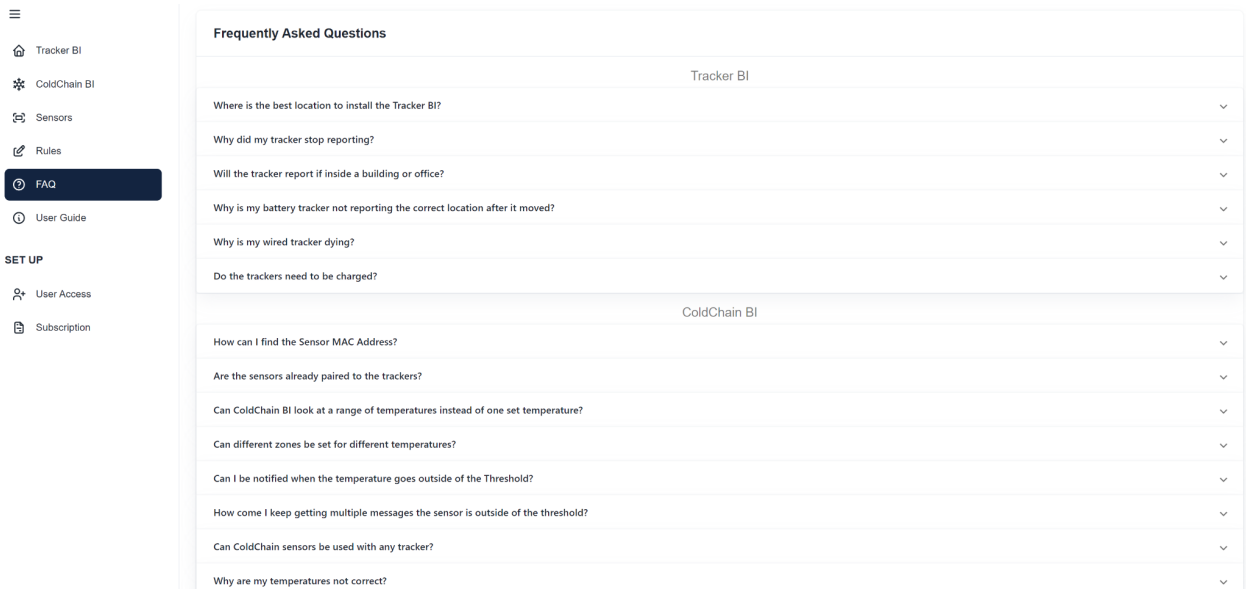
You can receive email notifications when your sensors fall in or out of compliance. Rules will automatically populate when you set a threshold

a. Click on Groups & Rules
b. Scroll down to the ADVANCED section
c. Click on the rule you want to receive an email for, Coldchain Rules have a format of “ColdChain In/Out of Compliance - Zone X Threshold X *F”
d. Click Notifications
e. Click Add email
f. Type in the email you want to receive the compliance emails
g. Click Add
h. Click Save



FAQ

This lists frequently asked questions in relation to Tracker BI and ColdChain BI, but if you have any questions or concerns, do not hesitate to reach out to our support team at 678-759-2544, option 3.



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