ADD-IN GUIDE

GoInsights Add-In Guide.

GoInsights™
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GoInsights Add-In Process

Solution onboarding:

•Partner Support database access that the cameras will be associated with
- **Customer to grant FH Support Manager initial access**
- FH Support will add the GoInsights API and GoInsights Support User
- FH Support will remove personal user and utilize GoInsights User for additional support needs
- FH Support User will utilize this naming convention: fleetsupport_{databasename}@goinsights.com
- **Customer to share a temporary password via secure method and per guidelines**
- FH Support User will need Admin access (this is needed for initial setup, can be changed after implementation)

•Install the GoInsights Add-in
- FH Support User will install and complete this step
- Go to System Settings - Add-ins - New Add-in and then paste code below

•Setup the Service Account
- FH Support User will complete these steps
- This requires View Only access with Group Access
- Admin access can be setup for easier implementation
- FH Support User will utilize this naming convention: goinsights_service_account_{database name}@goinsights.com

Additional notes:

•Custom Security Clearances may be introduced in Geotab to control access to different GoInsights features

•The subscriptions will automatically populate inside their associated database
- Subscriptions will need to be subscribed on the Subscriptions page

•Begin to configure your dashboard and reports

GoInsights Add-in Code

```
{
     "name": "GoInsights",
     "supportEmail": "support@fleethoster.com",
     "version": "1.0",
     "items": [
          {
               "url": "https://api-st-service-
na.azurewebsites.net/appsetting/getfile?name=index.html&app=goinsights",
               "path": "",
               "menuName": {
                    "en": "GoInsights"
               },
               "svgIcon": "https://api-st-service-
na.azurewebsites.net/appsetting/getfile?name=icon.svg&app=goinsights",
               "icon": "https://api-st-service-
na.azurewebsites.net/appsetting/getfile?name=icon.svg&app=goinsights"
          }
     ],
     "solutionId": "fleetHosterGoInsights",
     "isSigned": false
}
```
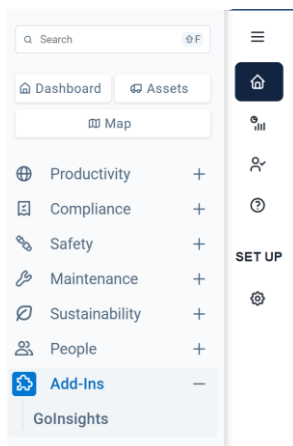
GoInsights™
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GoInsights seamlessly integrates Geotab and Surfsight into one powerful, easy-to-use dashboard. Enhance your fleet safety management experience with real-time insights and comprehensive data at your fingertips. Transform the way you monitor and manage your fleet, ensuring maximum safety and efficiency.

Say goodbye to complicated processes and hello to streamlined success with GoInsights! 🚚🧳

Accessing GoInsights Add-In
Please ensure that the GoInsights add-in is installed.
In order to access GoInsights, click *Add-Ins*, then *GoInsights*.

Subscribing cameras to GoInsights
*For cameras to utilize the features of GoInsights, they must be subscribed.*
   a. Click the down arrow next to Set up
   b. Click *Subscription*
   c. Under Devices Not Subscribed, select the cameras you would like to subscribe by checking the box next to the camera's IMEI, then click *Subscribe*. To subscribe all cameras at once, check the box next to *All*. If at any point you would like to unsubscribe a camera, check the boxes next to that camera in the Devices Subscribed column and click *Unsubscribe*.
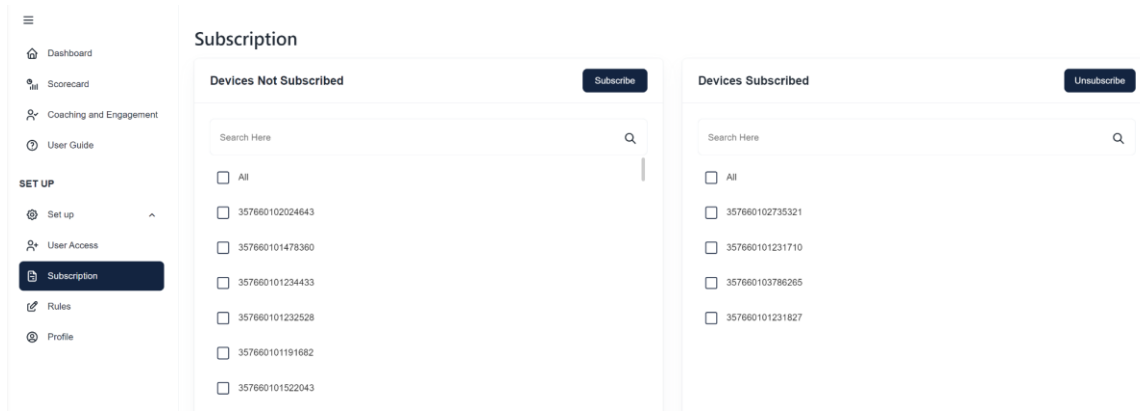
User Access for GoInsights

This grants users the ability to access GoInsights. Users must already have access to the Geotab database in order to gain access to GoInsights.

    a.   Under Set up, click *User Access*

    b.   Click *Add Users*

    c.   Type in the search bar to add the User to the GoInsights Add-In

    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, edit profiles, and coach; while users without administrator privileges can view only.
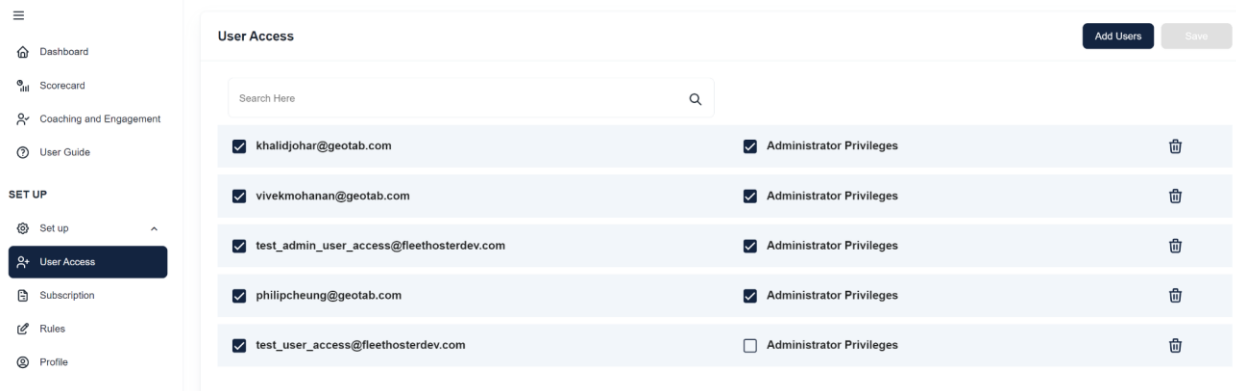
Setting up Camera Rules

This will allow you to gain insights based on the selected rules, and customize your scoring.

    a.   Under Set Up, click *Rules*

    b.   Select the checkbox next to any of the below rules you would like to enable

    c.   Click *Save*

Creating a Score Profile

This feature allows you to set up a scorecard that shows you how your subscribed cameras are currently scoring based on Camera Rules.

    a.   Under Set up, click *profile*

    b.   Click + next to Score Profile

    c.   Name your Profile, click *confirm*

    d.   Check the box next to the rules that you would like to apply to the profile

    e.   Select a weight percentage based on how much weight you would like each rule to have, the sum must equal 100%.

Dashboard

The Dashboard displays an easy overview of your fleet featuring rules, events, and trend lines for you to quickly review and coach your drivers.

Dashboard can be sorted by date range, score profile, and vehicle or driver.

- To select a date range for your Dashboard, click the calendar icon and chose the time frame you would like to view.
- To view your Dashboard by Score Profile, click the drop-down arrow under *Score Profile* to select your profile.
- To sort your Dashboard by Vehicle or Driver, click the drop-down arrow next to *Score by*.
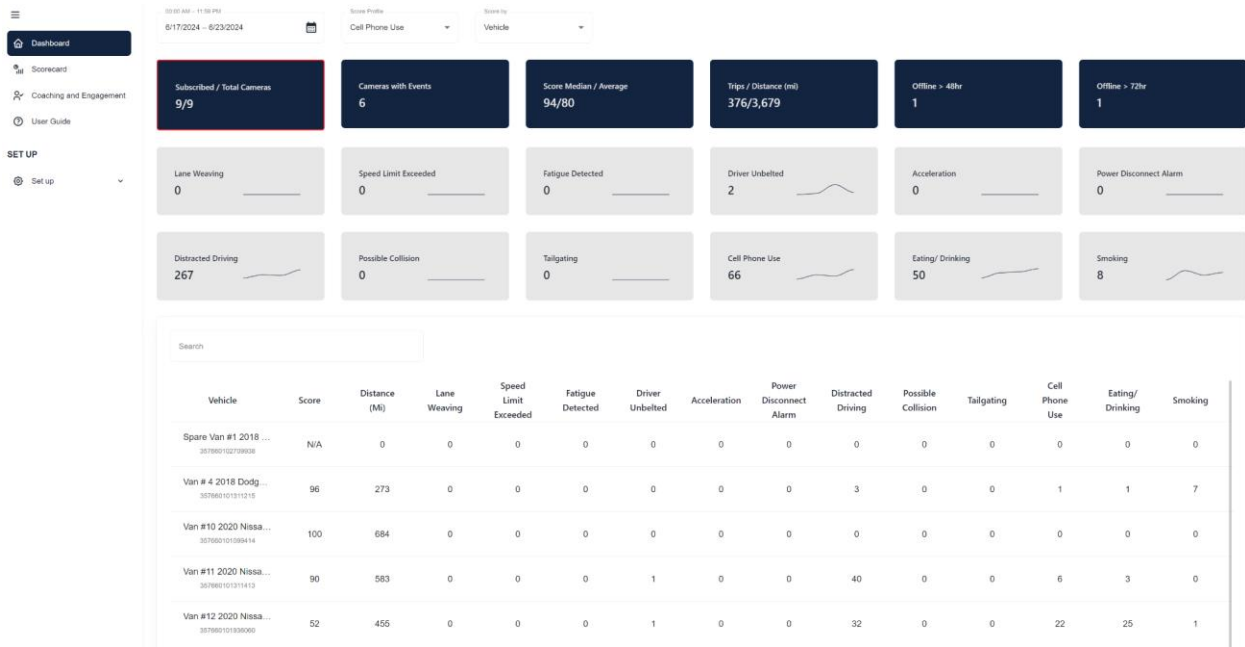
Details Page

In the Details page, you can coach your drivers, view the drivers score, the amount of coachings they have had in a certain time frame, and the drivers rank within the company. The Details page also shows the status of the Geotab device, the camera, and any engine faults that have populated.
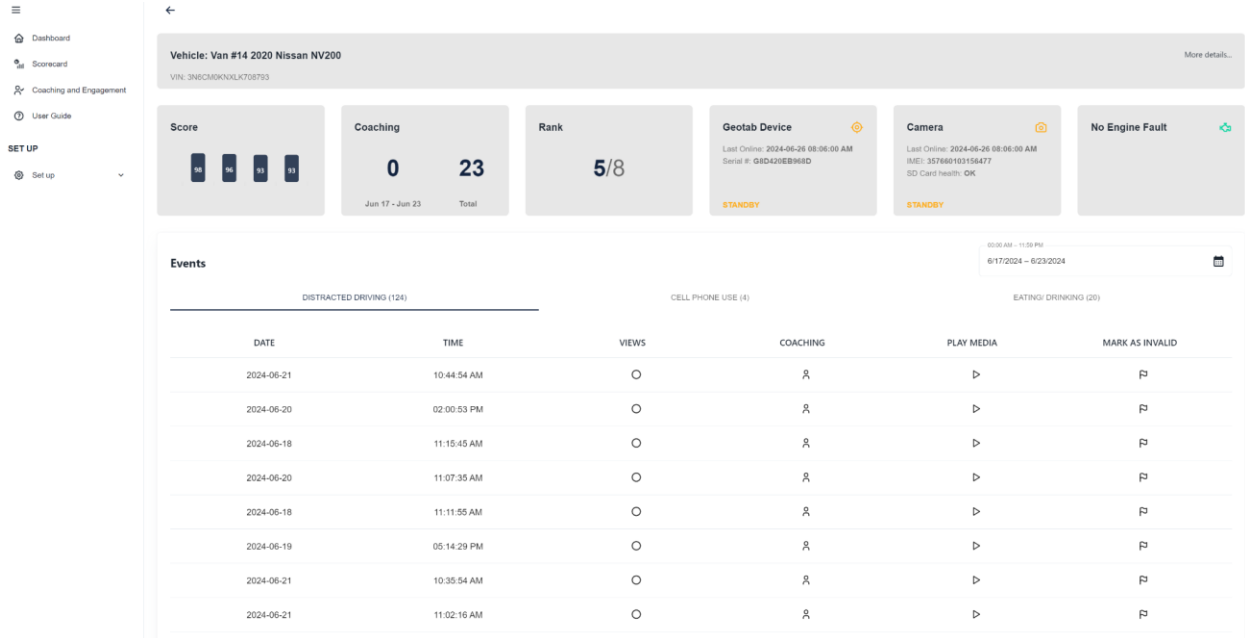

To view details and coach events from the dashboard
   a. Click on the number amount under the rule that was broken to view the details of the event.
   b. To change the time range of events shown, click the calendar icon.

c. To change the event type, click the tab of the rule you would like to view.
d. To coach a driver, you must first view the media associated with the event.
e. To view media, click the play button under *PLAY MEDIA* column, then you can view and download the event, and add comments.
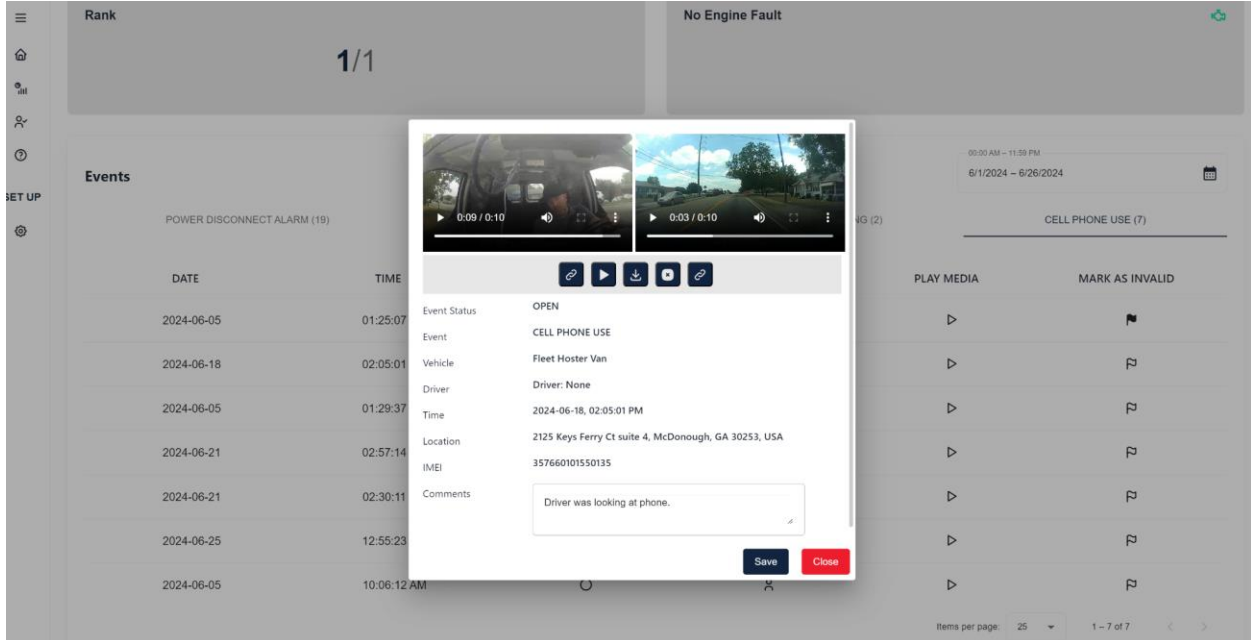
f. Once the media has been viewed, click the icon under the coaching column. Here you can select the administrative action taken, add notes, then *save*.
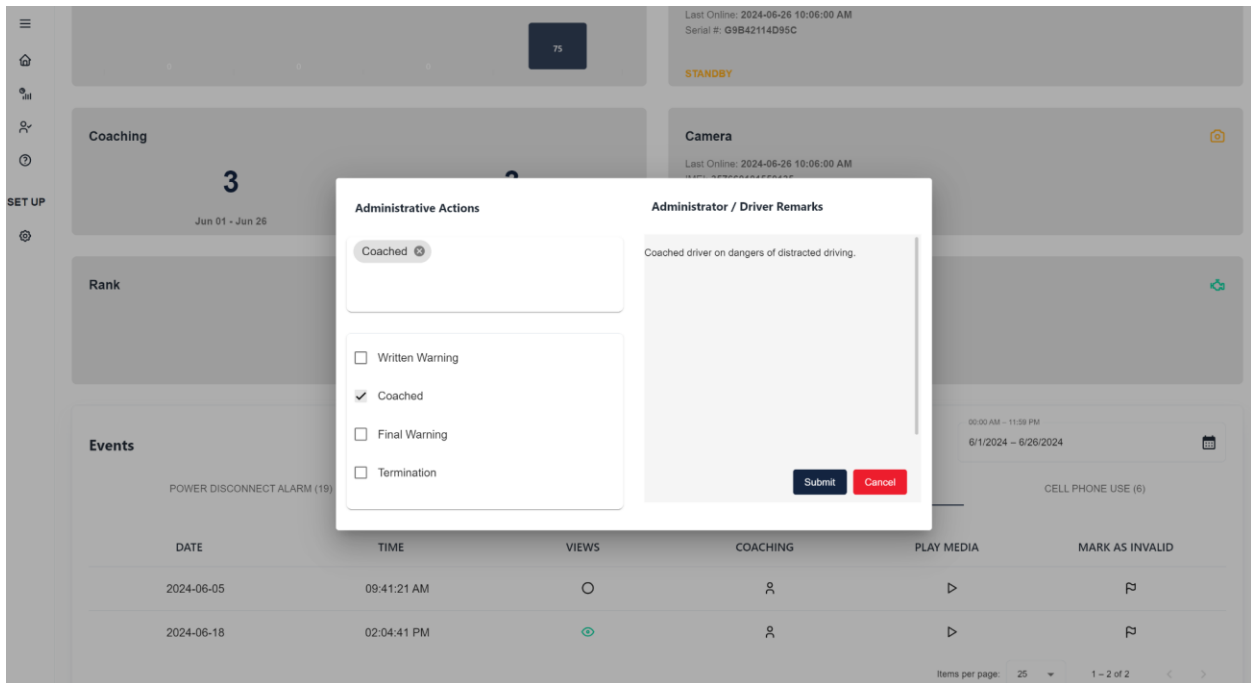
g. If your driver has not broken the rule as stated, click the flag to mark the rule as invalid to remove the event.

Scorecard

Scorecard shows an all-encompassing report based on each Score Profile broken down by vehicle and rule. This report is based on 30 days time range.

You can view your scorecard by going to your menu options and selecting S*corecard*.

     a. To sort by Score Profile, click the drop down under *Score Profile* and select the profile you would like to view.

     b. To sort by driver or vehicle, click the drop down under *Score by*.

     c. To export your scorecard to excel by clicking *Export*.

*This report is based on 30 days time range

Score Profile: Cell Phone Use Score by: Vehicle [Search] [Export]

Rank	Vehicle	Score	Distance (Mi)	Score Chart	Fatigue Detected	Tailgating	Eating/ Drinking	Lane Weaving	Power Disconnect Alarm	Possible Collision	Smoking	Distracted Driving	Acceleration	D Unl
4	1167-229-9005 357660102735321	99	2120		0	0	0	0	0	0	0	4	0	
2	1194-318-0588 357660101231827	100	2431		0	0	0	0	0	0	0	0	0	
1	Jose 340-3690 357660103786265	100	3243		0	0	2	0	0	0	0	1	0	
3	Sell-1180-217… 357660101231710	99	920		0	0	0	0	0	2	0	13	0	

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Coaching and Engagement

This will display your history of coaching activities.

To view coaching history

     a. Select the time range that you would like to view

     b. Click the drop down arrow next to the vehicle you would like to view the coaching's for

     c. To export your coaching history to Excel, click *Export*

Search Here

Export

VEHICLE	DRIVER	NUMBER OF EVENTS	COACHING EVENTS
∧ Fleet Hoster Van 357660101550135	None	3	4

COACHED BY	COACHED DATE	EVENT NAME	DRIVER REMARKS	ADMINISTRATIVE AC
fleetsupport_fh_demo@goinsights.c...	2024-06-26 02:18:17 PM	Cell Phone Use	Driver coached on company policy ...	Written Warning,Co
fleetsupport_fh_demo@goinsights.c...	2024-06-26 02:24:14 PM	Distracted Driving	Coached driver on dangers of distra...	Coached
fleetsupport_fh_demo@goinsights.c...	2024-06-26 02:13:36 PM	Cell Phone Use	N/A	N/A
fleetsupport_fh_demo@goinsights.c...	2024-06-26 02:13:09 PM	Cell Phone Use	Coached driver on avoiding cell pho...	Written Warning,Co

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