

# GETTING STARTED WITH OPTAC3 WEB - Admin User

## 1. Access OPTAC3 Web

The OPTAC3 Web link can be found in the e-mail that was sent to you when signing up. You may access OPTAC3 Web by clicking on the link provided in the e-mail. Your customer name will be filled in automatically. Please take note of your customer name, as you may need it later.

Alternatively, go to [www.optac3.com](http://www.optac3.com) and log on after entering your customer name.

To set up the system, you need to log on to OPTAC3 Web as administrator. The administrator user name is **admin** and the password has been e-mailed to you.

If you don't know or have forgotten your admin password, click on the red "Password?" link to reset it.

Log on as admin now.



## 2. Time Zone and DST Settings

The first time you log on to OPTAC3 Web as admin, you will be prompted to select your time zone. If you are based in the UK or Ireland, select (GMT) and make sure that "Use Daylight Saving Time" is ticked.

## 3. Create Depots, Users

Click on "Users" (top left).


If you have different depots and would like this to be reflected in OPTAC3, click on  "Depot Management"; otherwise proceed directly to  "User Management".

Since the admin user can only configure the system, you have to create at least one standard user in order to be able to work with OPTAC3. Only standard users can import data and run reports.

Create a standard user by clicking on "Add User". Specify the user name; the password has to be at least six characters long and must contain at least one number.


If you have depots, you need to assign them to standard users. Do this by moving them from available depots to assigned depots when you create or edit a user.

## 4. Configure WTD / Hours Law


Settings for the working time directive can be configured by clicking on Configuration and then on the following icon:  "WTD Settings". These settings are system-wide and determine the circumstances under which working time infringements will be shown on reports and the calendar view.

## 5. OPTAC3 Connect

OPTAC3 Connect allows you to import data automatically from 3<sup>rd</sup> party data providers. Currently we support FleetBoard, Volvo and Scania systems. OPTAC3 Connect can be configured by clicking on

"Configuration" and then on the following icon:  "OPTAC3 Connect Settings".

## 6. Install Import Wizard

For importing more than one digital file at a time or scanning analogue charts, you need to install the OPTAC3 Import Wizard which is available for download on Configuration > System Configuration:  Click then on "Setup" next to "Import Wizard Setup".

Download the file and run it once downloaded. Adjust the settings as needed – chances are you don't need to change anything.

After the install there should be a new icon on your desktop called "OPTAC3 Import Wizard". The first time you start up the Import Wizard, you will be prompted to enter your customer name.



Log out of OPTAC3 Web.

From now on, in the majority of cases you will log on to OPTAC3 Web as standard user.

# GETTING STARTED WITH OPTAC3 WEB - Standard User


## 7. Getting Your Data into OPTAC3 Web

- **Digital Data**



Start the Import Wizard and log on as standard user.

Select "OPTAC Download Tool" if you use the OPTAC tool. For other devices like the digifobpro, or to import files from a folder on your PC, select "Multiple File Import" and follow the instructions on-screen.


You may also import a single file directly through the webpage by clicking on "Data Input" and then on the "Import Digital Files" icon .

- **Analogue Data**

Start the Import Wizard and log on as standard user.

Select "Analogue Chart Scanner" and follow the instructions on-screen.

After importing analogue charts, they need to be processed.


Log on to OPTAC3 Web as standard user and go to "Data Input". Click on  "Process Analogue Charts", select a chart and click "Open".

Level the chart by rotating it and enter the centre field details at the right-hand side.

Click on continue. Check if the activities have been picked up correctly and click on "Save" at the bottom. The chart is now processed.

## 8. View Data – Calendar View



The best place to get a quick overview over your analogue and digital drivers is on the Calendar View. Log on

as standard user. Click on "View Data – Drivers" at the top and then on  "View Combined Digital and Analogue Data". Select a driver, and then month and year. An overview of the selected calendar month for the driver is being displayed now. Days with infringements have a red triangle in the lower right corner. Select the day and click on "Day View" for further information regarding infringements and a graphical trace.

## 9. Top Reports



Currently, there are over 30 reports available in OPTAC3 Web. They can be accessed by clicking on "Reports" and

then on  or  for driver or vehicle reports respectively. Here is a short list of reports that we believe to be the most valuable for you:

- **Driver's Letter / Infringements EU**

These reports display an overview about the daily totals and a list of all infringements that occurred for the driver(s) in a certain time frame. These reports are almost identical, with the only difference being that the Infringements EU report is generated for every selected driver, the Driver's Letter only for drivers who have committed infringements.

- **Card Download Reminder / Vehicle Download Reminder**

These reports show the last download dates for your drivers or vehicles, assisting you in keeping track of when to download cards and tachographs again.

- **EU Infringement Table / WTD Infringement Table**

These reports display a table with the number of infringements by category for your drivers, allowing you to identify training needs amongst your drivers quickly. The EU Infringement Table displays violations against the Hours Law, the WTD Infringement Table those against the Working Time Directive.

### ***Would you like monthly reports automatically emailed to you?***

Sign up now for the OPTAC3 Plus service: <https://www.optac.info/uk/optac3-tachograph-analysis/optac3-plus/>

If you are unsure of any of the above, you can find help by looking at:

1. The OPTAC3 'Home' page - here you can find our Hints and Tips to get you started in a few easy clicks.
2. The Help Box - built in within the software and located at the bottom of each page.
3. The OPTAC3 FAQs at <https://www.optac.info/uk/faq>

**Any questions? Please give us a call on 01382 866 356**

or e-mail [helpdesk@stoneridge.com](mailto:helpdesk@stoneridge.com)

***We also offer training sessions for OPTAC3 Web.***