

# EROAD

## Depot Inspect Training



## EROAD



# Learning Objectives

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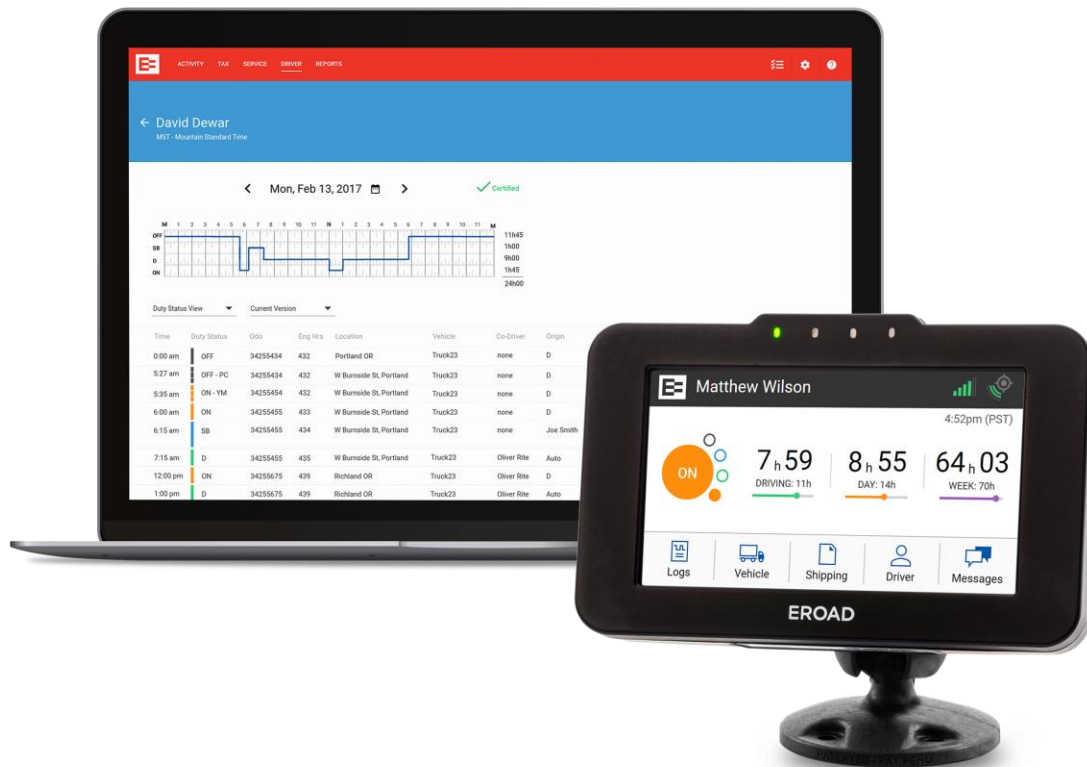
You will learn about the following items in this training session:

- Performing pre-requisites tasks before using Inspect (set up driver profiles, enter all vehicles/assets)
- Evaluating changes in defect processing and considering a staged rollout in your organization
- Accessing the Defect Board
- Managing defects and filtering defect cards
- Processing defect items
- Using the Action icon features
- Viewing defect details
- Using templates
- Viewing the inspections list and applying filters
- Viewing inspection details
- Downloading and printing an Inspection report

# Beginning Steps



**EROAD**



# Inspect Overview

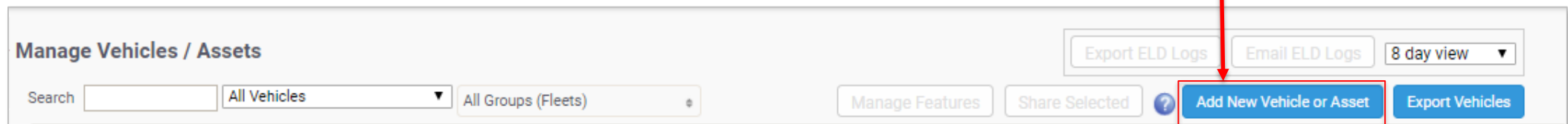
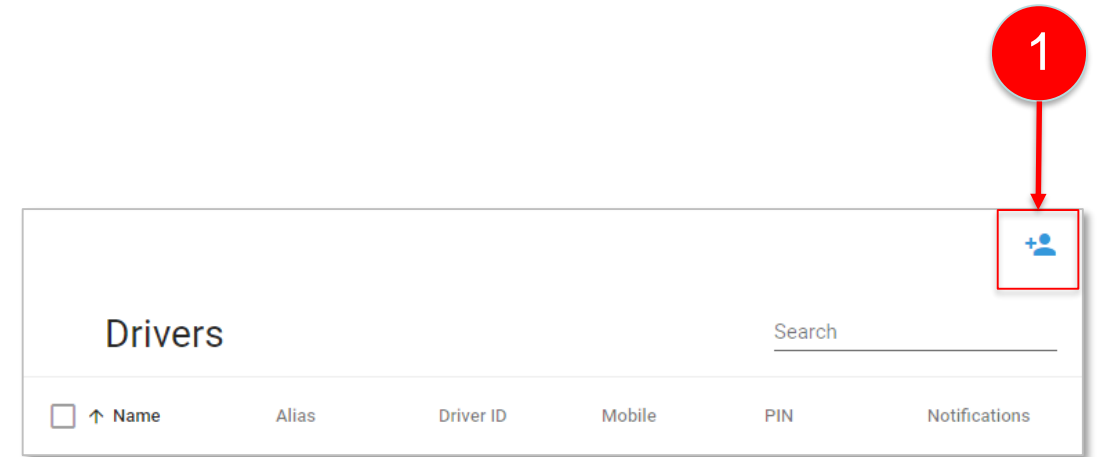


- EROAD Inspect sets the standard for vehicle inspections and is based on 49 CFR Subpart 396.11 and Subpart 396.13
- EROAD's Driver Vehicle Inspection Report (DVIR) enables drivers to add feedback regarding the condition of a vehicle, asset, or trailer
- All completed reports can be reviewed and are stored in Depot
- Inspection report identifies defect item(s) reported, name of the driver, and the vehicle / trailer identification
- DVIR is electronically signed by using the driver's login credentials
- Electronic signatures are used to record date/time stamps as the defect is managed through the EROAD Inspect Defect Board. Electronic signatures are used to certify that the defect has been repaired, and then by the driver, who verifies the repair on the in-vehicle device
- A driver can:
  - Sign off that the required repairs have been completed against each existing defect
  - Sign off that a repair has been completed roadside and verify that the required repairs have been completed before operating the vehicle again
  - Sign off that there is a certification that no repair was required against the existing defect

# Pre-requisites before Using Inspect

DVIR is only available for trucks that have ELD activated. Ensure that the following steps are completed before using Inspect:

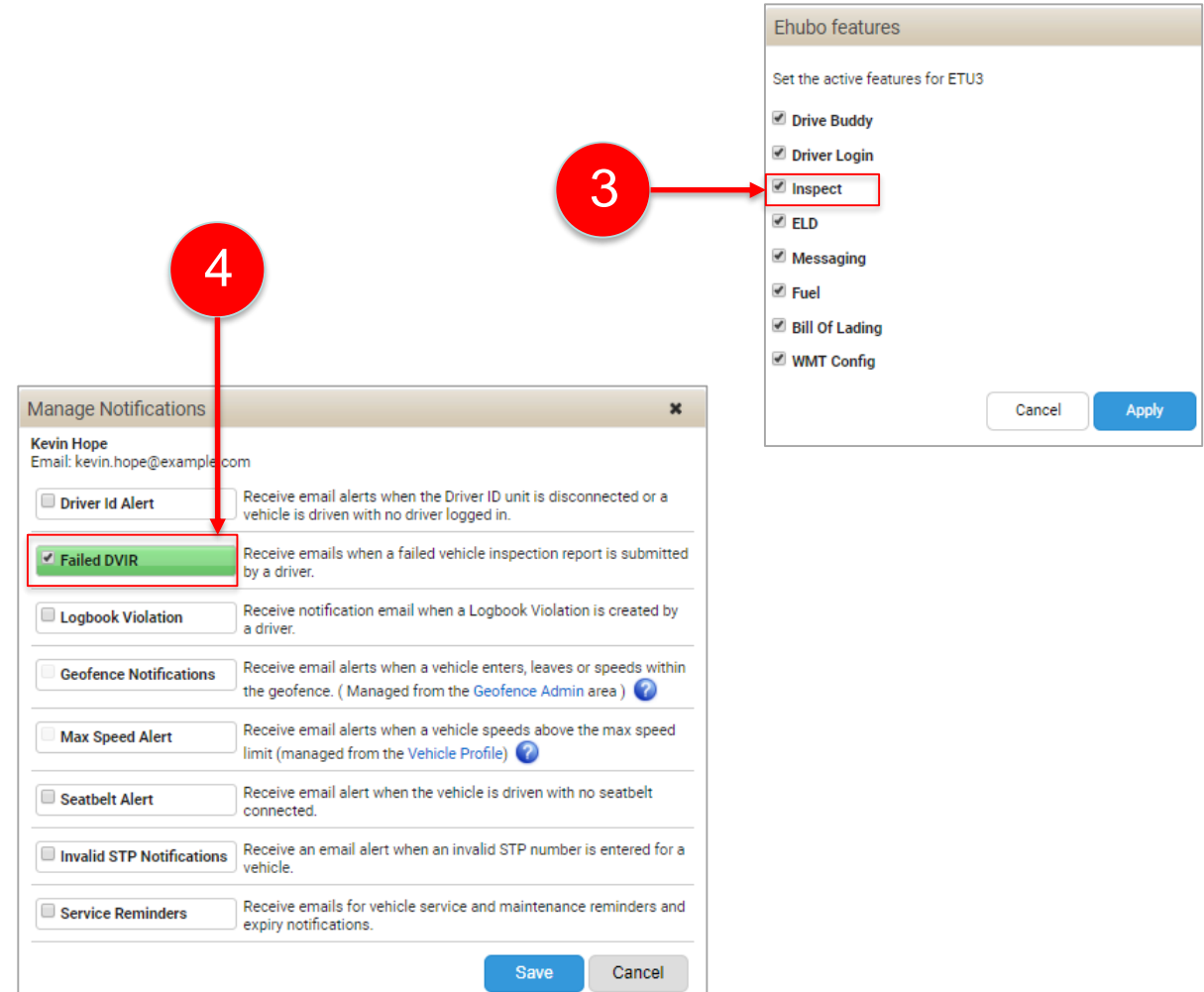
1. Set up driver profiles in the *Driver* menu.  
See the [S6 Depot Setup – Add a Driver](#) lesson for instructions.
2. Enter trailer information under *Administration > Vehicles and Assets*  
See the [S5 Depot Setup – Add a Vehicle](#) lesson for instructions.





# Pre-requisites before Using Inspect (continued)

3. Enable the **Inspect** checkbox under [Manage Vehicles and Assets > Managed Features](#). *Note: ELD should already be activated.*
4. (Optional) Set up **Failed DVIR** email notifications regarding each driver whenever a DVIR is submitted with a failed status under [Administration > Notifications](#).



The image displays two screenshots from the EROAD system interface, illustrating the steps to enable the 'Inspect' feature and configure 'Failed DVIR' notifications.

**Top Screenshot (Ehubo features):** This window shows the 'Ehubo features' section with the instruction 'Set the active features for ETU3'. A list of features is displayed, each with a checkbox. The 'Inspect' checkbox is highlighted with a red box and a red circle containing the number 3, indicating it should be enabled. Other features include Drive Buddy, Driver Login, ELD, Messaging, Fuel, Bill Of Lading, and WMT Config. 'Cancel' and 'Apply' buttons are at the bottom right.

**Bottom Screenshot (Manage Notifications):** This window shows the 'Manage Notifications' section for user 'Kevin Hope' (Email: kevin.hope@example.com). A list of notification types is displayed, each with a checkbox. The 'Failed DVIR' checkbox is highlighted with a red box and a red circle containing the number 4, indicating it should be checked. Other notification types include Driver Id Alert, Logbook Violation, Geofence Notifications, Max Speed Alert, Seatbelt Alert, Invalid STP Notifications, and Service Reminders. 'Save' and 'Cancel' buttons are at the bottom right.

Red arrows and circles with numbers 3 and 4 point from the text instructions to the corresponding checkboxes in the screenshots.

# Changes in Defect Processing

- Some existing processes that support a paper system must change because you are no longer walking paper records from desk to desk
- Your mechanic or safety manager must take action once a defect appears in the Inspect Defect Board; EROAD recommends:
  1. Setting up *Failed DVIR notifications* in Depot, so the responsible employees are informed when a defect needs to be remedied.
  2. Setting up a daily task to review the Defect Board in Depot periodically to see if anything new has been submitted from your drivers and monitor repair progress.



# Staged Roll-out



- EROAD recommends that you start with a small group of vehicles and drivers in your fleet to give your mechanic or safety manager time to adjust and learn more about EROAD Inspect
- Select a pilot group of vehicles and their drivers
- Train them on how to submit inspections and certify defects using EROAD Inspect DVIR
- Slowly start bringing more drivers and vehicles onboard

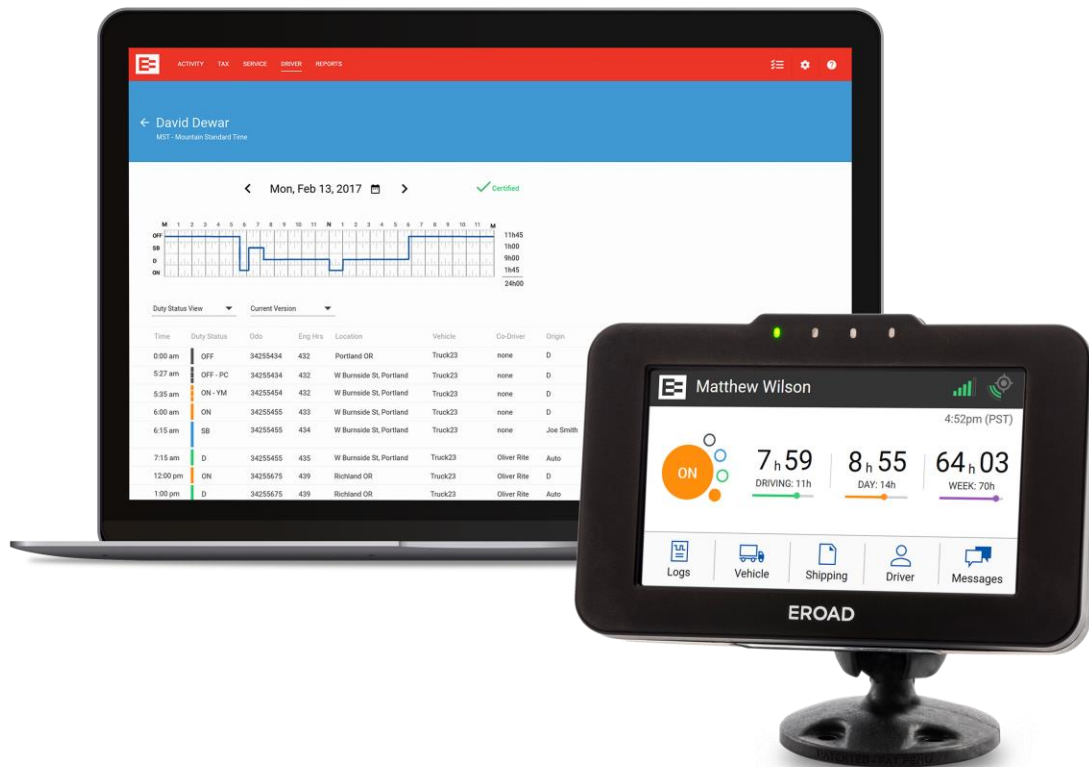




# Using Depot Inspect

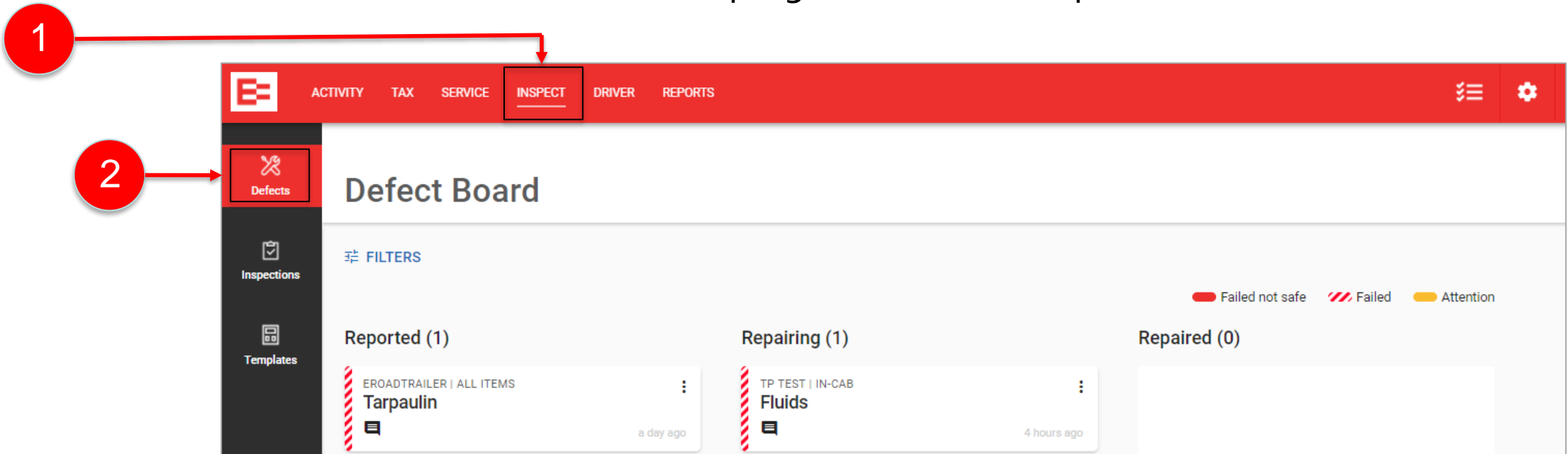


**EROAD**



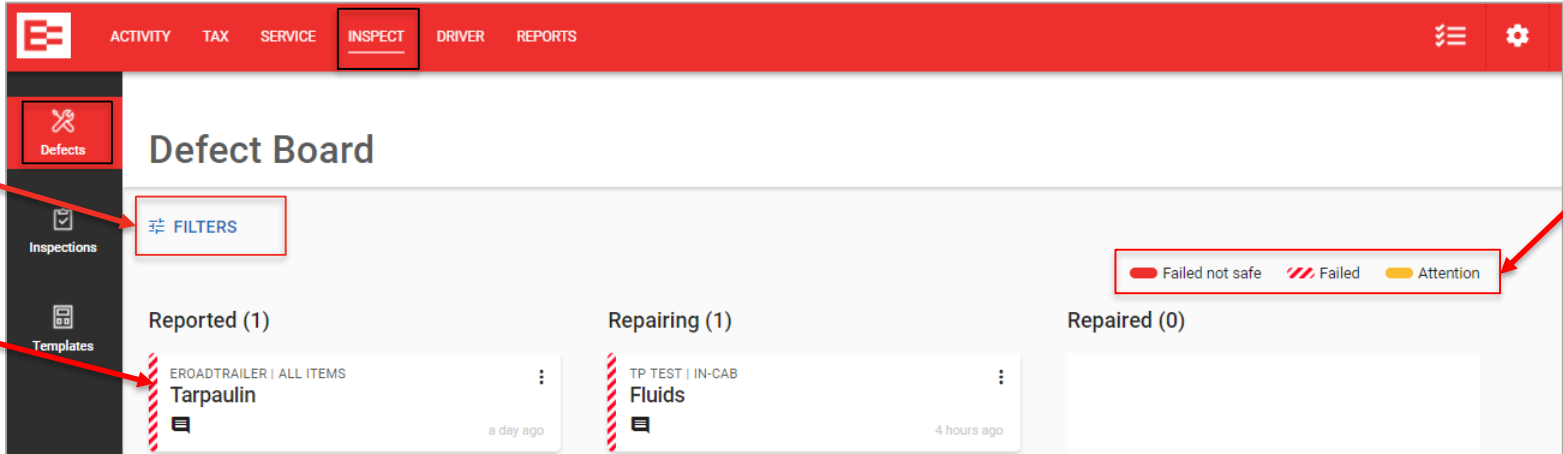
# Accessing the Defect Board

1. Click the **Inspect** menu (includes Defects, Inspections, and Templates).
2. The Defect Board appears first.
  - Inspect DVIR feature on the in-vehicle device interfaces with the Defect Board to display all defect items that have failed or are unsafe
  - Position of each item on the board shows its progress toward completion.



# Managing Defects

- Defect items are displayed as cards that are moved across the board per their progress status
- Defects appear in the Reported column first (left side of the screen)
- Status levels are *Reported*, *Repairing*, and *Repaired*
- Defects are prioritized based on their severity
- Each defect card is color-coded on the left edge by severity:
  - **Solid red** — Failed, not safe to drive; prioritized at the top of the queue
  - **Striped red** — Failed; prioritized below unsafe items



The screenshot shows the EROAD Defect Board interface. The top navigation bar is red with the EROAD logo and tabs for ACTIVITY, TAX, SERVICE, INSPECT (selected), DRIVER, and REPORTS. A left sidebar contains icons for Defects, Inspections, and Templates. The main area is titled 'Defect Board' and is divided into three columns: Reported (1), Repairing (1), and Repaired (0). The 'Reported' column contains a defect card for 'EROADTRAILER | ALL ITEMS Tarpaulin' with a striped red severity indicator. The 'Repairing' column contains a defect card for 'TP TEST | IN-CAB Fluids' with a striped red severity indicator. A legend on the right shows three severity levels: 'Failed not safe' (solid red), 'Failed' (striped red), and 'Attention' (yellow). Annotations with red arrows point to the 'Filters Icon' in the sidebar, the 'FILTERS' button, the 'Defect Severity Color' on the card edge, and the 'Severity Color Codes' legend.

Filters Icon

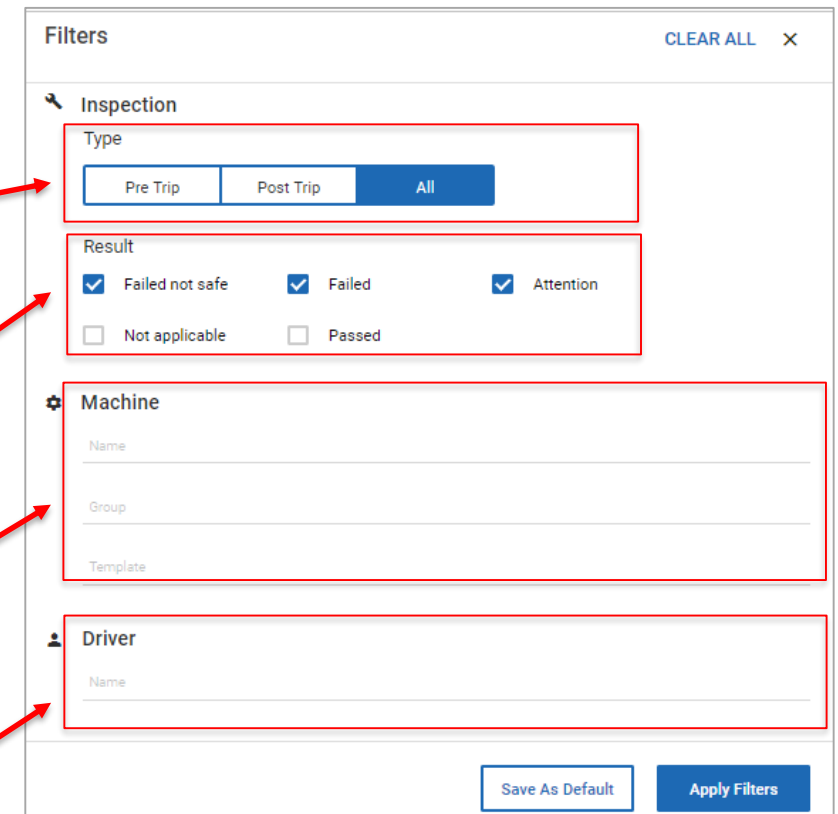
Defect Severity Color

Severity Color Codes

Failed not safe Failed Attention

# Filtering the Defect Board


- Use filters to reorganize the Defect Board and display only specific items
- Filter options are:
  - **Inspection Type** — Select the type of inspection; defaults to *All* inspections
  - **Inspection Result** — Select defects based on its result [*Failed (Safe)* or *Failed (Not Safe)*]
  - **Machine** — Select defects based on vehicles/assets listed in *My Organization > Vehicles/Assets*. Select the name of the vehicle/asset and its group
  - **Driver** — Select defects for a specific driver

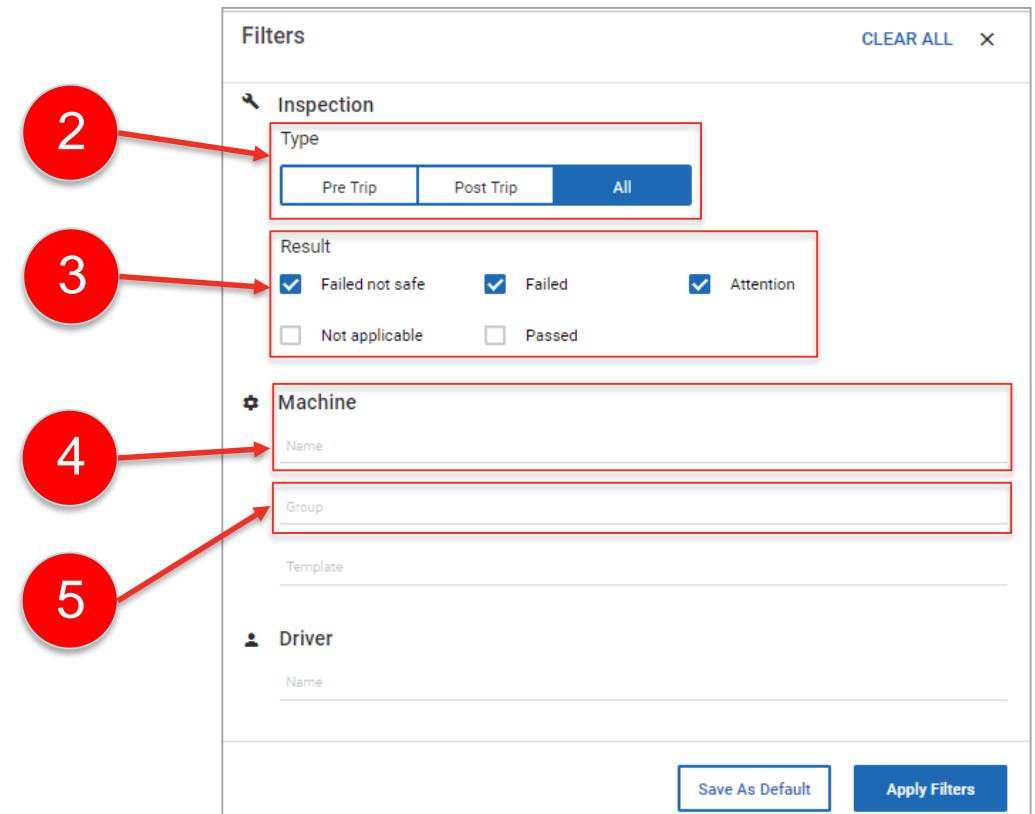


The screenshot shows the 'Filters' panel in the EROAD interface. It contains four main filter sections: 'Inspection', 'Machine', and 'Driver'. The 'Inspection' section has a 'Type' dropdown with 'Pre Trip', 'Post Trip', and 'All' (selected), and a 'Result' section with checkboxes for 'Failed not safe', 'Failed', 'Attention', 'Not applicable', and 'Passed'. The 'Machine' section has input fields for 'Name', 'Group', and 'Template'. The 'Driver' section has a 'Name' input field. At the bottom are 'Save As Default' and 'Apply Filters' buttons. Red boxes and arrows from the text on the left point to these sections: 'Inspection Type' points to the 'Type' dropdown, 'Inspection Result' points to the 'Result' checkboxes, 'Machine' points to the 'Name' and 'Group' fields, and 'Driver' points to the 'Name' field.

# Filtering the Defect Board (continued)

Perform the following steps to apply filters:

1. Click the **Filters**  **FILTERS** icon to open the Defect Board Filters dialog box. See [slide 10](#).
2. (optional) Click **Pre-Trip** or **Post-Trip** to filter on just one inspection type.
3. Click the *Result* checkbox(es) that you want to filter (such as **Failed not safe**).
4. (optional) Click in the **Machine Name** field and select the vehicle name from the list.
5. (optional) Click in the **Machine Group** field and select the group from the list. *Note: The Template field is not editable at this time.*



The screenshot shows the 'Filters' dialog box with the following sections and callouts:

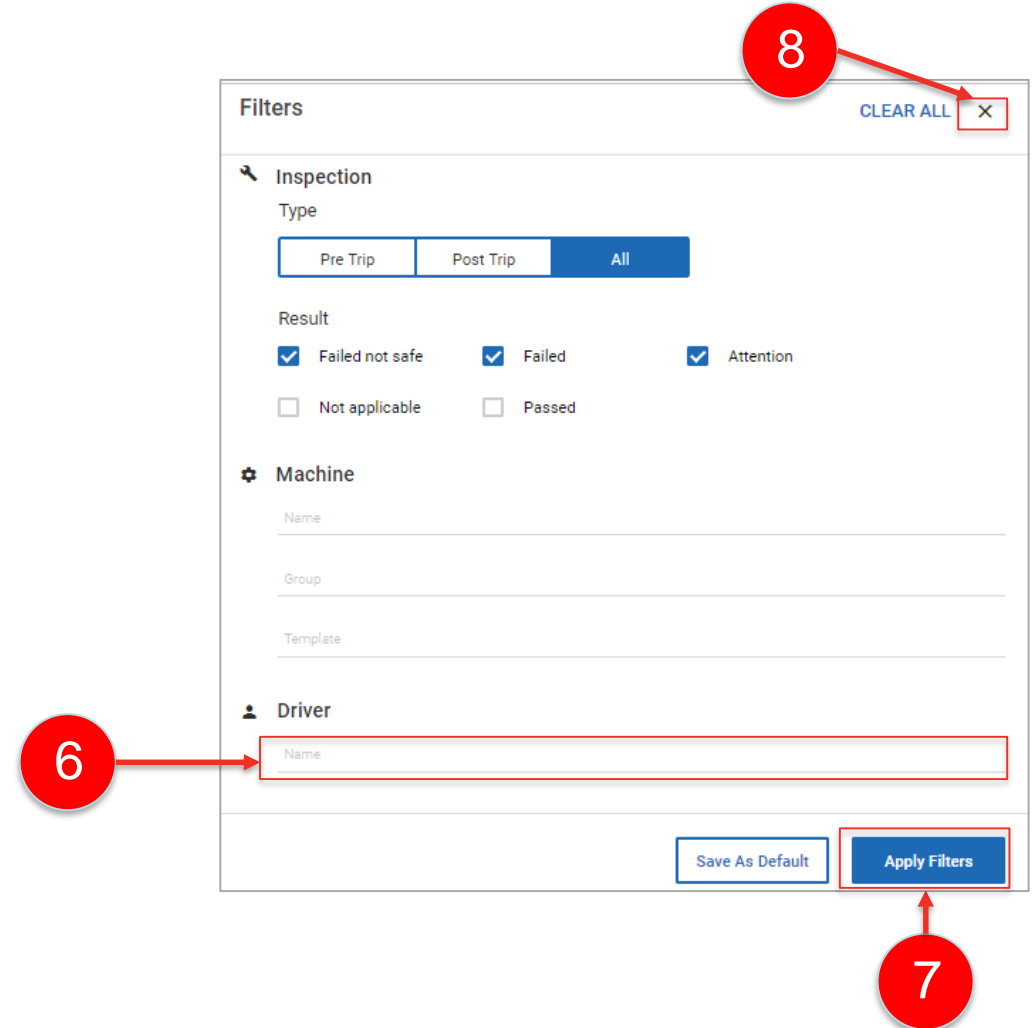
- 2** points to the 'Type' section under 'Inspection', which includes 'Pre Trip', 'Post Trip', and 'All' buttons.
- 3** points to the 'Result' section, which includes checkboxes for 'Failed not safe', 'Failed', 'Attention', 'Not applicable', and 'Passed'. The 'Failed not safe', 'Failed', and 'Attention' checkboxes are checked.
- 4** points to the 'Machine' section, which includes a 'Name' field.
- 5** points to the 'Group' field in the 'Machine' section.

At the bottom of the dialog box, there are two buttons: 'Save As Default' and 'Apply Filters'.



# Filtering the Defect Board (continued)

6. (Optional) Click in the **Driver Name** field and select the specific driver's name as the filter.
7. Click **Apply Filters** to reorganize the Defect Board.  
*Note: You can click **Save As Default** if you want to save your filter selections as your default view.*
8. Click the **X** in the upper right corner to close the Filters dialog box.



The screenshot shows the 'Filters' dialog box in the EROAD application. It contains sections for 'Inspection', 'Machine', and 'Driver'. The 'Inspection' section has tabs for 'Pre Trip', 'Post Trip', and 'All', and checkboxes for 'Failed not safe', 'Failed', 'Attention', 'Not applicable', and 'Passed'. The 'Machine' section has input fields for 'Name', 'Group', and 'Template'. The 'Driver' section has a 'Name' input field. At the bottom are 'Save As Default' and 'Apply Filters' buttons. A 'CLEAR ALL' button with an 'X' icon is in the top right corner. Red callout circles with numbers 6, 7, and 8 point to the 'Driver Name' field, the 'Apply Filters' button, and the 'X' icon, respectively.

Filters

CLEAR ALL X

Inspection

Type

Pre Trip Post Trip All

Result

☒ Failed not safe ☒ Failed ☒ Attention

☐ Not applicable ☐ Passed

Machine

Name

Group

Template

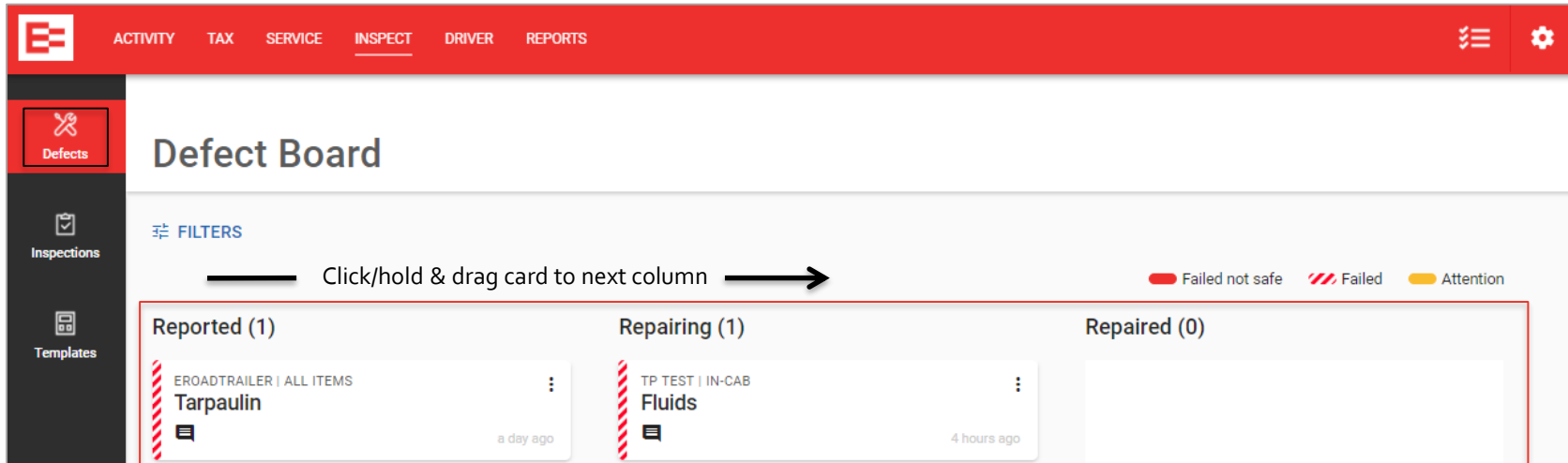
Driver

Name

Save As Default Apply Filters

# Processing Defect Items


- Each defect card displays a summary of the defect description [including the vehicle/asset name, inspection item name, severity, message or photo icon (optional), progress status, and the time of the last progress status change]
- Click and hold a defect card, then drag it to the next column to change the progress status
  - Defects are moved to the *Repairing* column when the item is being serviced
  - They are moved to the *Repaired* column when completed

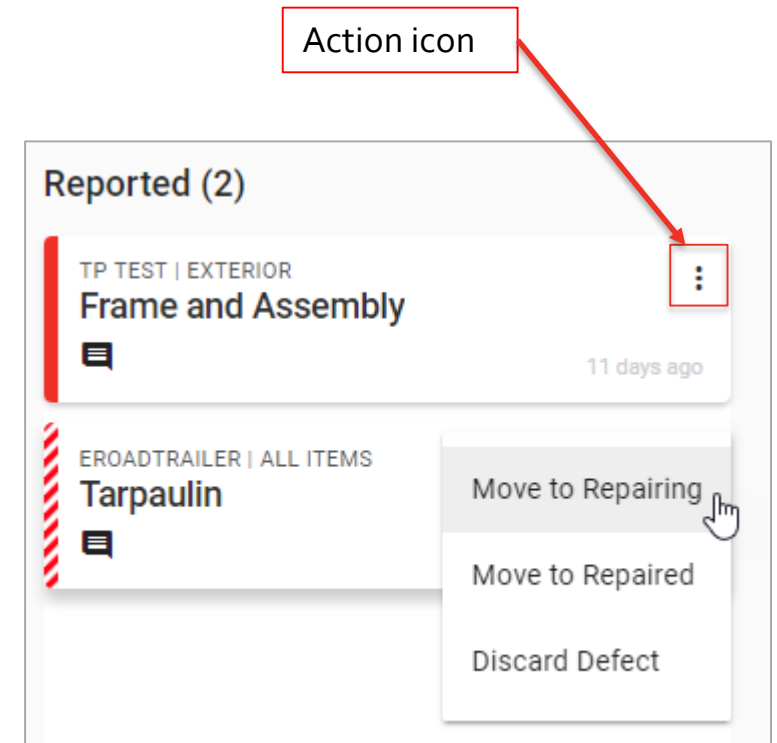


The screenshot shows the EROAD Defect Board interface. The top navigation bar includes tabs for ACTIVITY, TAX, SERVICE, INSPECT (selected), DRIVER, and REPORTS. A sidebar on the left contains icons for Defects, Inspections, and Templates. The main area is titled 'Defect Board' and features a 'FILTERS' section. Below this, there are three columns: 'Reported (1)', 'Repairing (1)', and 'Repaired (0)'. A red box highlights the 'Reported' and 'Repairing' columns. An arrow points from the 'Reported' column to the 'Repairing' column with the text 'Click/hold & drag card to next column'. The 'Reported' column contains a card for 'EROADTRAILER | ALL ITEMS Tarpaulin' with a red severity icon and a timestamp of 'a day ago'. The 'Repairing' column contains a card for 'TP TEST | IN-CAB Fluids' with a red severity icon and a timestamp of '4 hours ago'. A legend at the top right indicates that a solid red circle means 'Failed not safe', a red diagonal line means 'Failed', and a yellow circle means 'Attention'.

# Using the Action Icon

The Action icon (on the right side of the defect card) opens a drop-down list allowing you to select the next step in resolving a defect item. *Note: The options in the drop-down list vary depending on the current status of the item.*

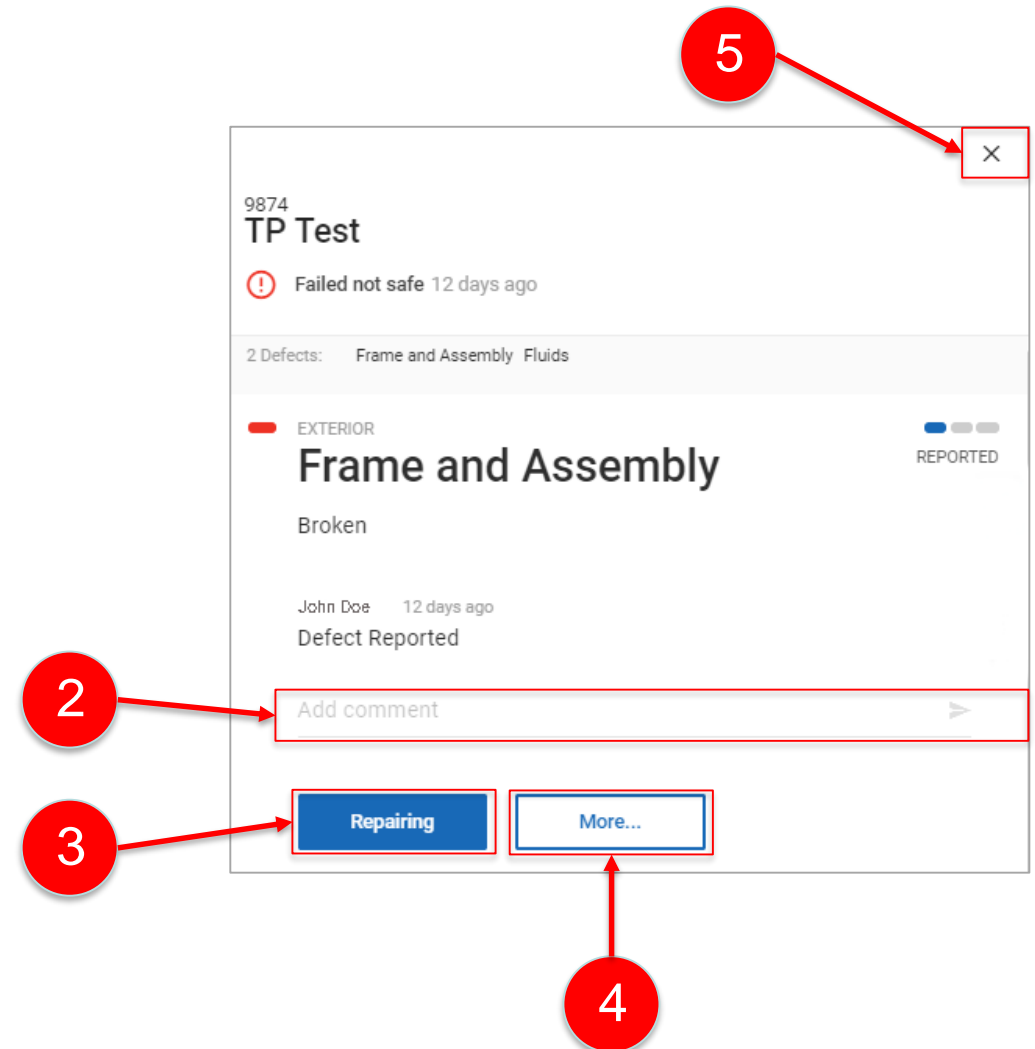
- Click the **Action**  icon to open the drop-down list and select one of the following actions:
  - **Move to Reported** — Moves the item to the Reported column
  - **Move to Repairing** — Moves the item to the Repairing column
  - **Move to Repaired** — Moves the item to the Repaired column
  - **Discard Defect** — Deletes the defect item and updates the status as discarded



# Viewing Defect Details

You can open defect items to view their details.

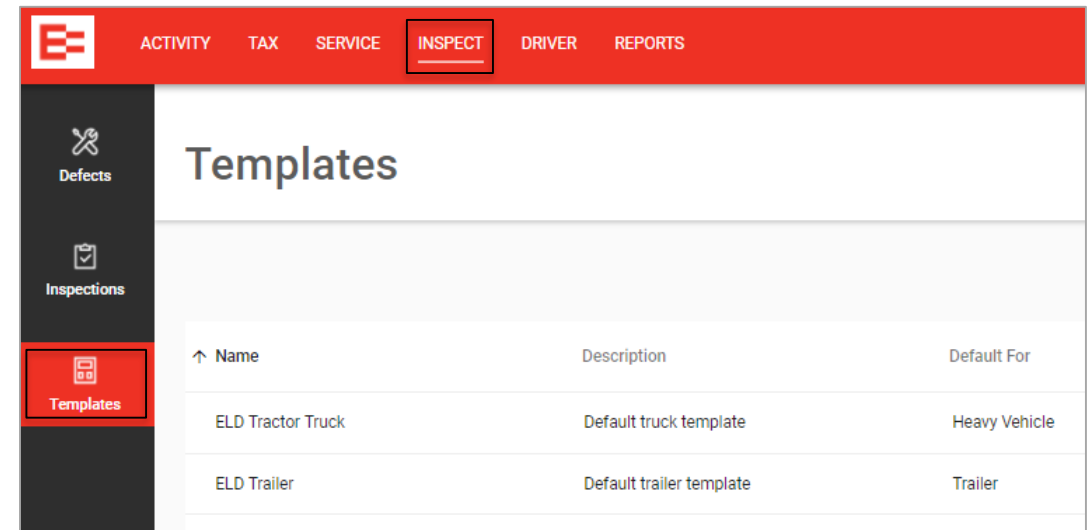
1. Click on a **defect item** in the Defect Board to open the defect details dialog box. This view includes all of the summary information as well as any additional comments that have been added.
2. (optional) Click the **Comment** field to add a remark about the repair.
3. Click the next repair status if the item is ready to advance to the next step, such as **Repairing**.
4. (optional) Click the **More** button to open a list of other status options, if needed, such as *Discard*.
5. Click the **X** in the upper right corner to close the dialog box.



# Using Templates

- Inspect templates are predefined forms that aid drivers in capturing and recording defects during vehicle inspections
- Default templates cannot be edited
- Inspection template covers the key elements that need to be reported by drivers
- Click **Inspect > Templates** to view the Templates list

*Note: Users will be able to create custom templates at a future date*



↑ Name	Description	Default For
ELD Tractor Truck	Default truck template	Heavy Vehicle
ELD Trailer	Default trailer template	Trailer



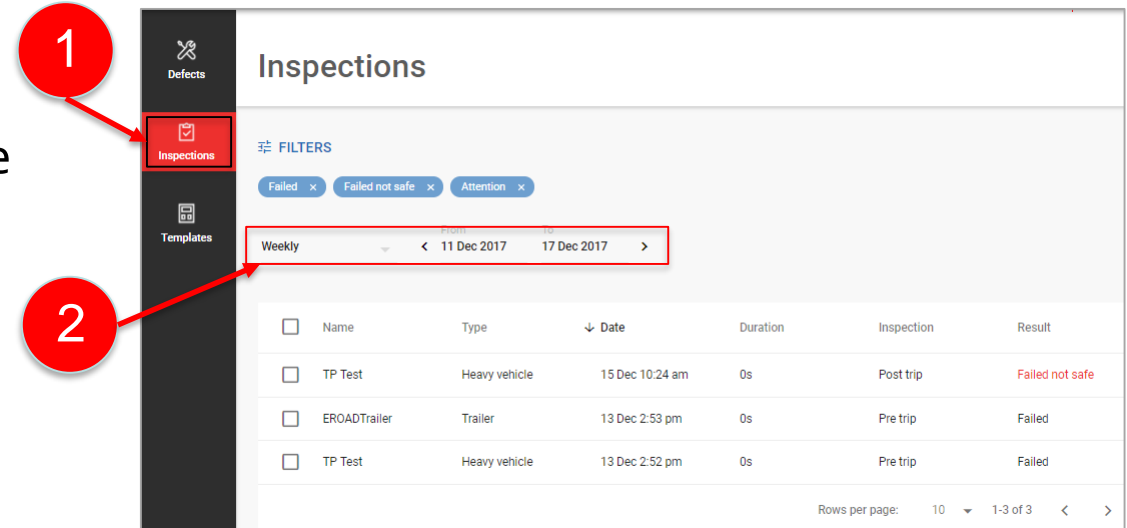
# Viewing the Inspection List

- Inspection reports are created when pre-trip or post-trip inspections are submitted by a driver through the EROAD DVIR on the in-vehicle device
- Inspection reports provide records of the actions taken on the defects
- Inspections are listed in chronological order with the most recent inspection shown at the top of the list

1. Click **Inspect > Inspections** to open the Inspections screen.

The view defaults to the current week.

2. Click the drop-down arrow beside weekly to change the view to daily, monthly, or select a custom date range.




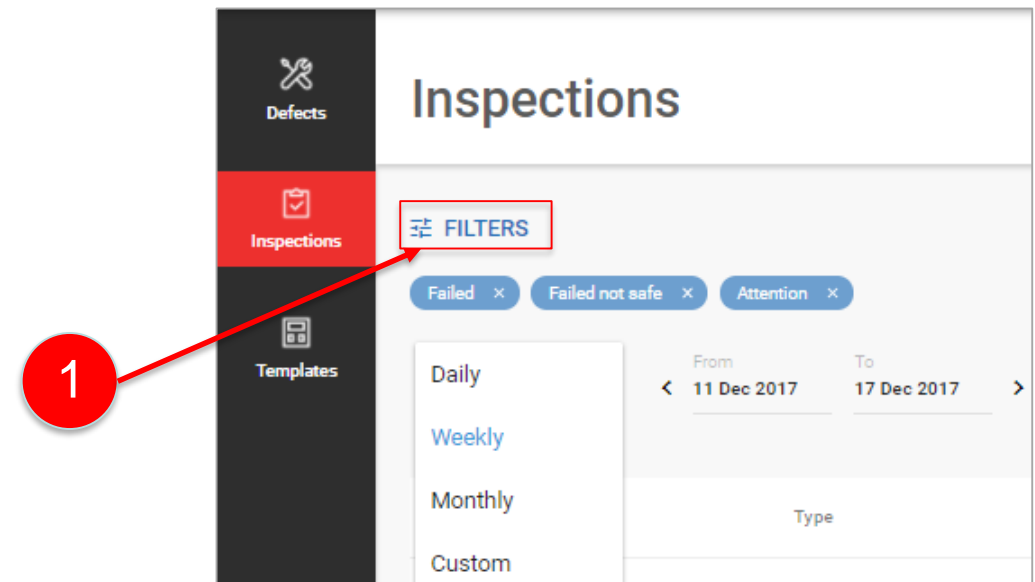
The screenshot shows the EROAD Inspections interface. A sidebar on the left contains icons for Defects, Inspections (highlighted with a red box and a red circle with the number 1), and Templates. The main area is titled 'Inspections' and features a 'FILTERS' section with buttons for 'Failed', 'Failed not safe', and 'Attention'. Below the filters, a date range selector is highlighted with a red box and a red circle with the number 2; it shows 'Weekly' as the selected view, with dates '11 Dec 2017' and '17 Dec 2017'. The main content is a table of inspection records.

<input type="checkbox"/>	Name	Type	↓ Date	Duration	Inspection	Result
<input type="checkbox"/>	TP Test	Heavy vehicle	15 Dec 10:24 am	0s	Post trip	Failed not safe
<input type="checkbox"/>	EROADTrailer	Trailer	13 Dec 2:53 pm	0s	Pre trip	Failed
<input type="checkbox"/>	TP Test	Heavy vehicle	13 Dec 2:52 pm	0s	Pre trip	Failed

At the bottom right, it says 'Rows per page: 10' and '1-3 of 3'.

# Filtering the Inspection List

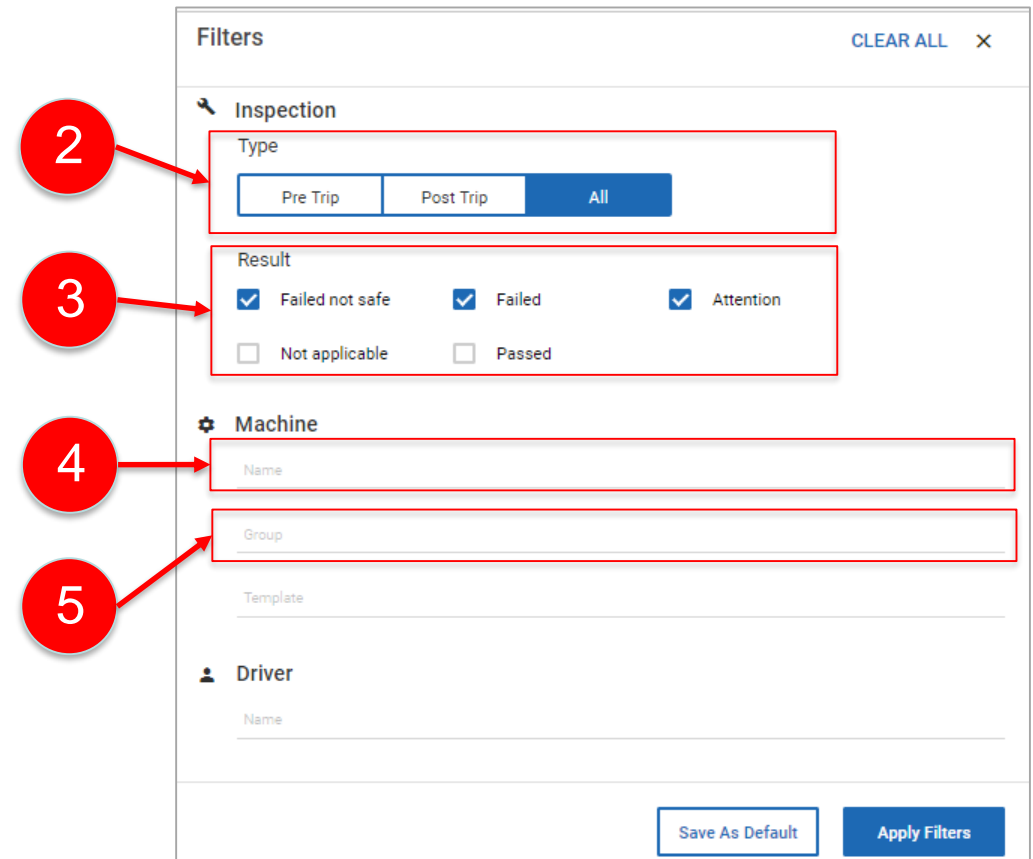
- Inspections are automatically filtered to display *failed or failed - unsafe to drive* inspections
  - Unsafe results are flagged in red text on the Inspections screen
1. Click the **Filters**  FILTERS icon to open the Filters dialog box.



# Filtering the Inspection List (continued)

2. Click the required **Type** button to filter on *Pre-Trip*, *Post-Trip*, or *All*.
3. Click the **Result** checkbox(es) that you want to include in the filtered list. Select one or more of the following options: *Failed not safe*, *Failed*, *Not applicable*, or *Passed*.
4. (Optional) Enter the **Machine Name**, if you want to filter on a specific vehicle or asset.
5. (Optional) Enter the **Machine Group**, if you want to filter on a specific group.

*Note: There are no filters for the Template field at this time.*



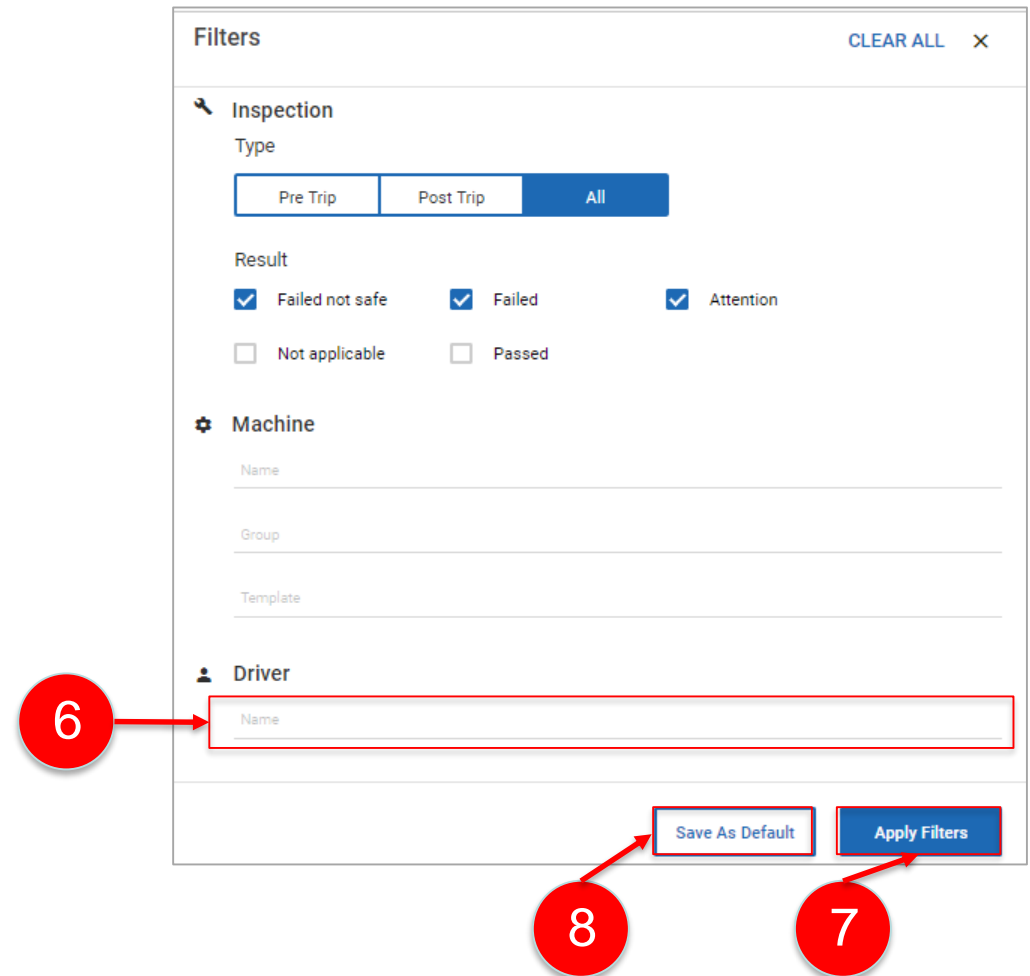
The screenshot shows the 'Filters' dialog box in the EROAD application. It contains several sections for filtering inspection data:

- Inspection** section:
  - Type**: Three buttons labeled 'Pre Trip', 'Post Trip', and 'All'. A red box and arrow labeled '2' point to the 'All' button.
  - Result**: Five checkboxes. 'Failed not safe', 'Failed', and 'Attention' are checked. 'Not applicable' and 'Passed' are unchecked. A red box and arrow labeled '3' point to the 'Failed not safe' checkbox.
- Machine** section:
  - Name**: A text input field. A red box and arrow labeled '4' point to this field.
  - Group**: A text input field. A red box and arrow labeled '5' point to this field.
  - Template**: A text input field, currently empty.
- Driver** section:
  - Name**: A text input field.

At the bottom right of the dialog are two buttons: 'Save As Default' and 'Apply Filters'.

# Filtering the Inspection List (continued)

6. (Optional) Enter the **Driver Name**, if you want to filter on a specific driver.
7. Click **Apply Filters** to save your filters and apply them to the Inspections list.
8. (Optional) Click **Save As Default** to save your settings as the default settings.



The screenshot shows the 'Filters' dialog box in the EROAD application. It has a title bar with 'Filters' and a 'CLEAR ALL' button. The dialog is divided into sections: 'Inspection' with 'Type' (Pre Trip, Post Trip, All) and 'Result' (Failed not safe, Failed, Attention, Not applicable, Passed); 'Machine' with 'Name', 'Group', and 'Template' fields; and 'Driver' with a 'Name' field. At the bottom are 'Save As Default' and 'Apply Filters' buttons. Red callouts with numbers 6, 7, and 8 point to the 'Driver Name' field, the 'Apply Filters' button, and the 'Save As Default' button respectively.

Filters CLEAR ALL ×

**Inspection**

Type

Pre Trip Post Trip All

Result

☒ Failed not safe ☒ Failed ☒ Attention

☐ Not applicable ☐ Passed

**Machine**

Name

Group

Template

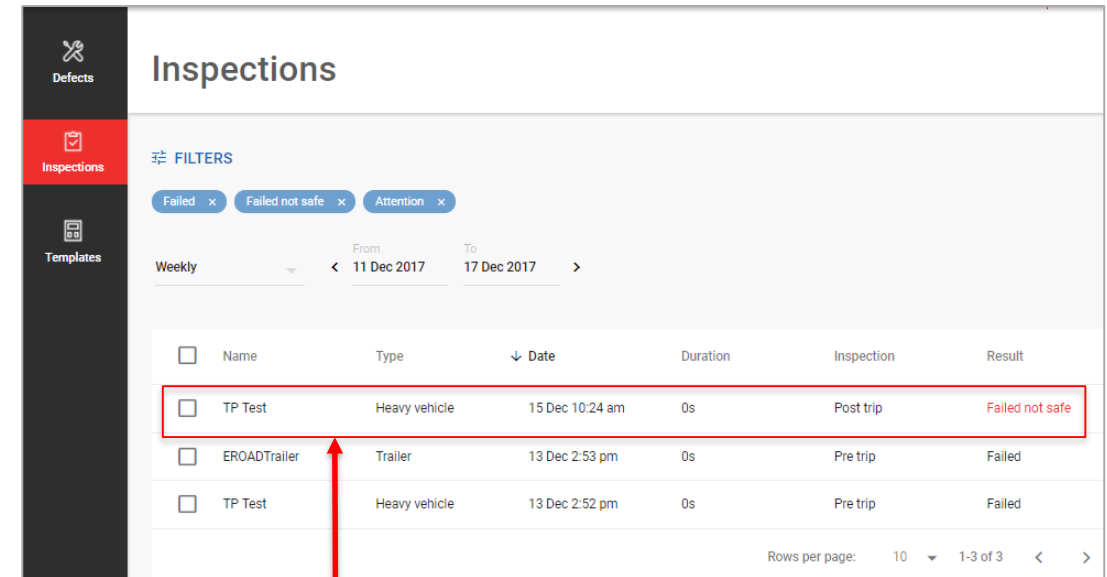
**Driver**

Name

Save As Default Apply Filters

# Viewing Inspection Details

1. Click on an **Inspection Name** in the list to open the Inspection dialog box.



Inspections

FILTERS

Failed x Failed not safe x Attention x

Weekly From 11 Dec 2017 To 17 Dec 2017

<input type="checkbox"/>	Name	Type	↓ Date	Duration	Inspection	Result
<input type="checkbox"/>	TP Test	Heavy vehicle	15 Dec 10:24 am	0s	Post trip	Failed not safe
<input type="checkbox"/>	EROADTrailer	Trailer	13 Dec 2:53 pm	0s	Pre trip	Failed
<input type="checkbox"/>	TP Test	Heavy vehicle	13 Dec 2:52 pm	0s	Pre trip	Failed

Rows per page: 10 1-3 of 3

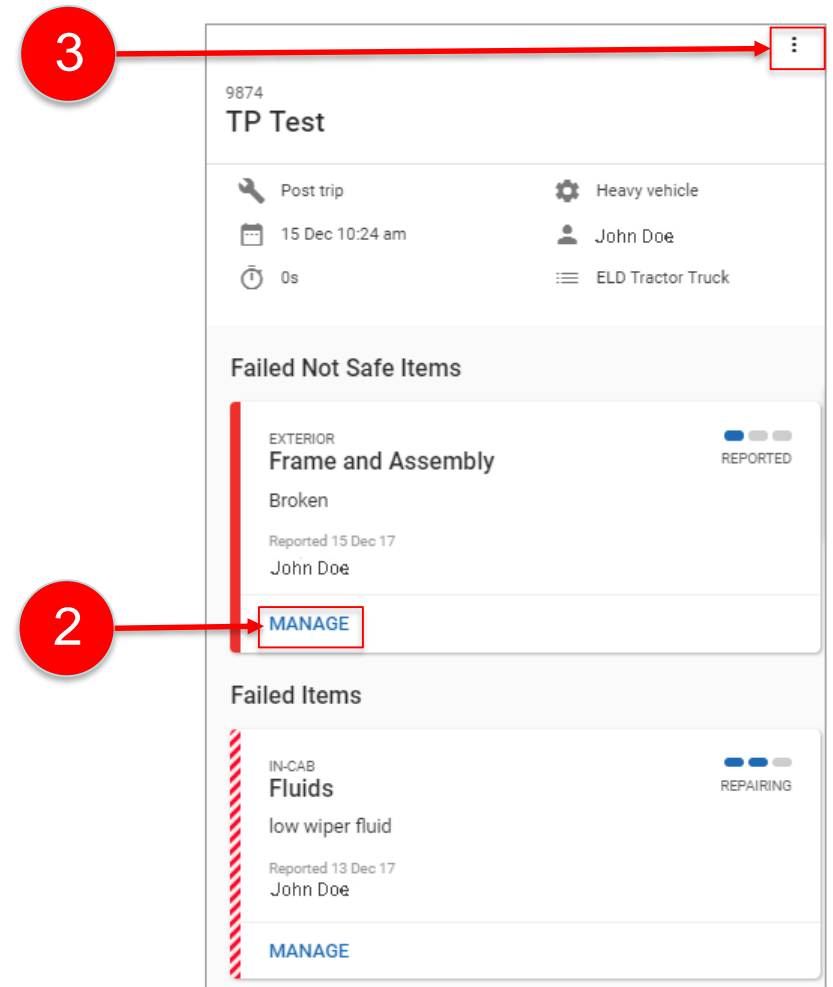
1



# Viewing Inspection Details (continued)

The Inspection dialog box displays all of the defect items associated with the vehicle or asset with the most severe defect shown on top.

2. (Optional) Click the **Manage** link to open the Defect Details for the specific defect. See [slide 16](#) for more information.
3. (Optional) Click the **Action** icon to open the drop-down list.



The screenshot shows the 'TP Test' inspection details for vehicle 9874. It includes trip information (Post trip, 15 Dec 10:24 am, 0s) and vehicle details (Heavy vehicle, John Doe, ELD Tractor Truck). Below this, there are two sections: 'Failed Not Safe Items' and 'Failed Items'. The 'Failed Not Safe Items' section shows a defect in the 'EXTERIOR Frame and Assembly' (Broken) reported on 15 Dec 17 by John Doe, with a 'REPORTED' status. The 'Failed Items' section shows a defect in 'IN-CAB Fluids' (low wiper fluid) reported on 13 Dec 17 by John Doe, with a 'REPAIRING' status. Two red circles with arrows point to specific elements: circle 3 points to the three-dot action icon in the top right corner, and circle 2 points to the 'MANAGE' link at the bottom of the 'Failed Not Safe Items' entry.

9874  
TP Test

Post trip  
15 Dec 10:24 am  
0s

Heavy vehicle  
John Doe  
ELD Tractor Truck

Failed Not Safe Items

EXTERIOR  
Frame and Assembly  
Broken  
Reported 15 Dec 17  
John Doe  
REPORTED

MANAGE

Failed Items

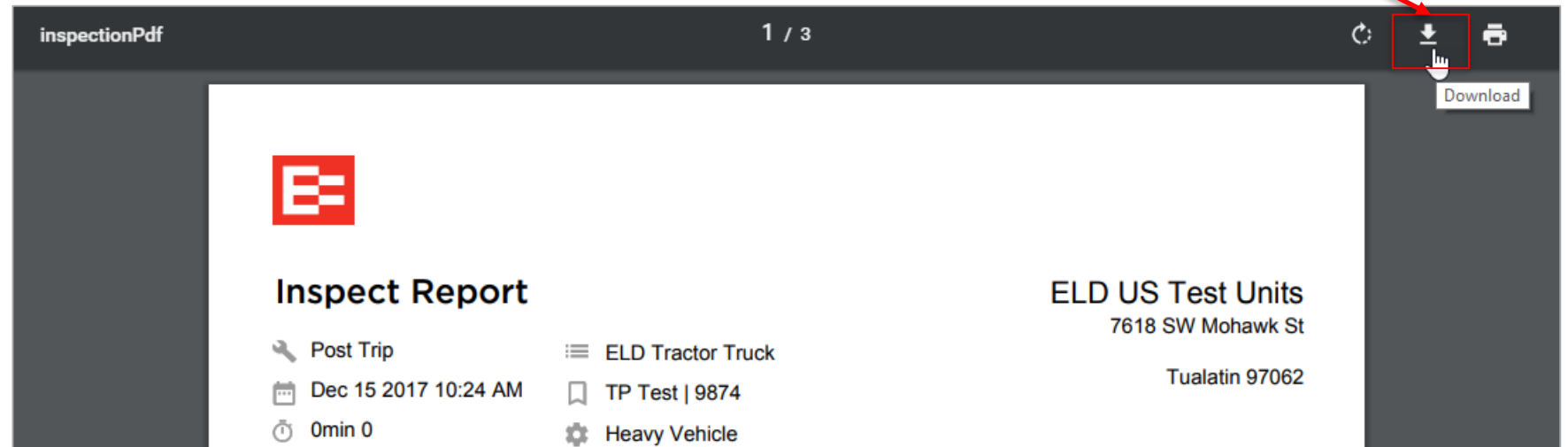
IN-CAB  
Fluids  
low wiper fluid  
Reported 13 Dec 17  
John Doe  
REPAIRING

MANAGE

# Downloading an Inspection Report

The Action drop-down list allows you to either hide passed items or download a PDF of the inspection report.

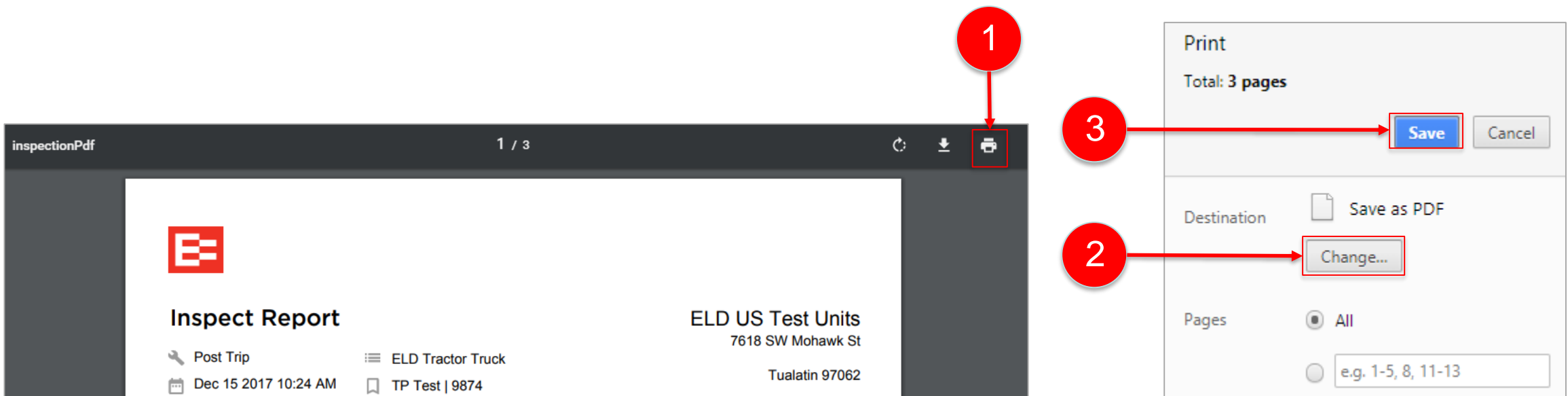
1. Click **Download PDF** to obtain a copy of the report.
2. Click the **Download** icon on the PDF screen.
3. (Optional) Save the report to your local computer.



# Printing an Inspection Report

There are two options for printing. You can save the inspection report to your local computer and then print it from there or you can print directly from the PDF.

1. Click the **Printer** icon on the PDF file to open the Print dialog box.
2. Click the **Change** button to either save the file as a PDF or select a destination printer.
3. Click **Save** to save the PDF or click **Print** to send it to your printer. The options change depending on your destination selection.



# Summary

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**EROAD**

In this lesson, you completed the following items:

- Performed pre-requisites tasks before using Inspect (set up driver profiles, enter all vehicles/assets)
- Evaluated changes in defect processing and considering a staged rollout in your organization
- Accessed the Defect Board
- Managed defects and filtering defect cards
- Processed defect items
- Used the Action icon features
- Viewed defect details
- Used templates
- Viewed the inspections list and applying filters
- Viewed inspection details
- Downloaded and printed an Inspection report

# THANK YOU

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EROAD

