EROAD
Depot Inspect Training
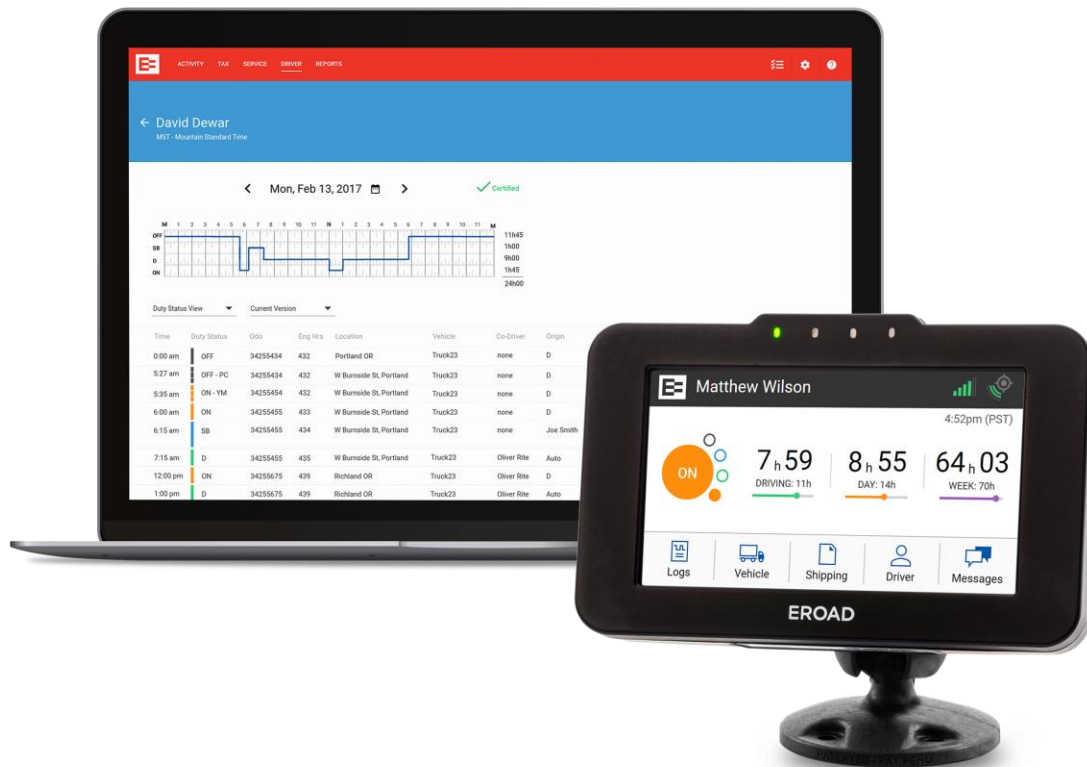
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Learning Objectives

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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
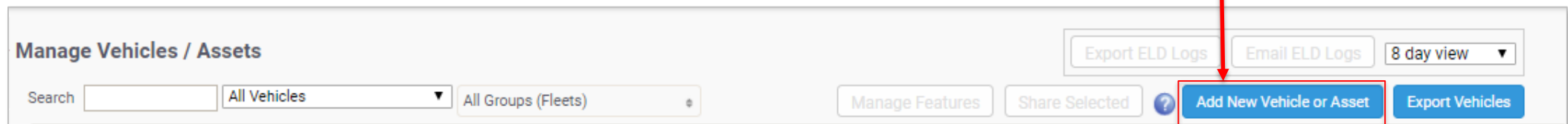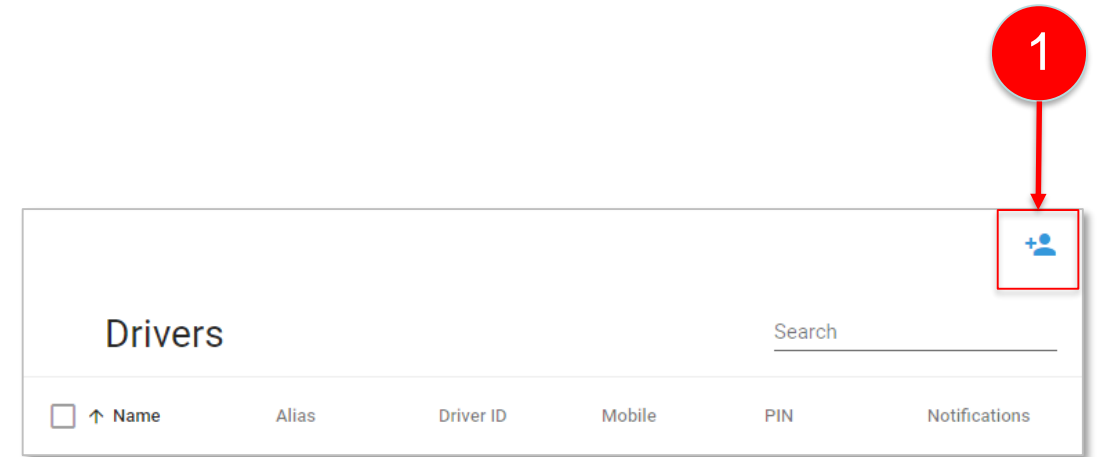
Beginning Steps

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

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DVIR is only available for trucks that have ELD activated. Ensure that the following steps are completed before using Inspect:
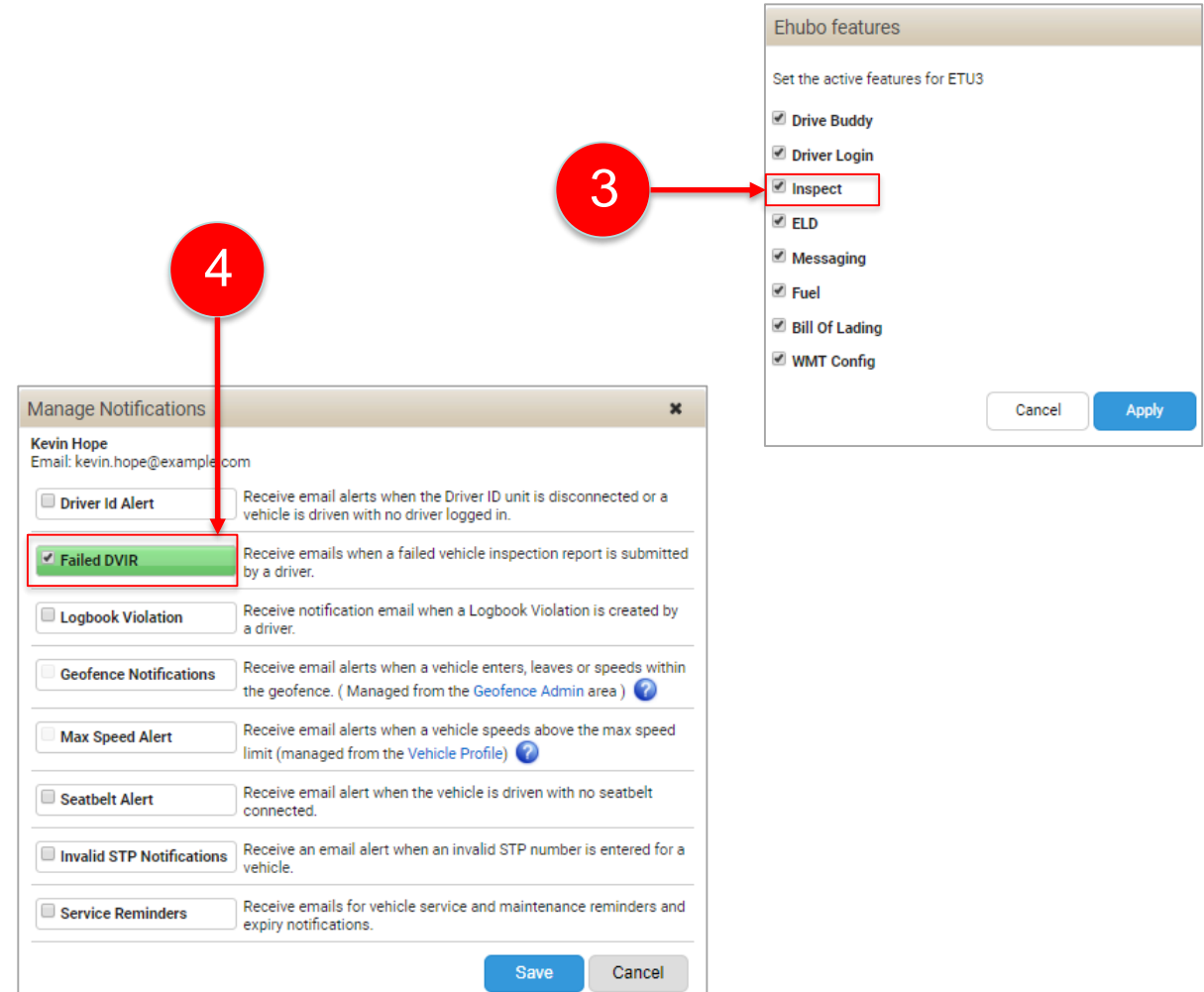
1. Set up driver profiles in the *Driver* menu. See the *S6 Depot Setup – Add a Driver* lesson for instructions.

2. Enter trailer information under *Administration > Vehicles and Assets* See the *S5 Depot Setup – Add a Vehicle* lesson for instructions.

1

Drivers

Search

☐ ↑ Name   Alias   Driver ID   Mobile   PIN   Notifications

2

Manage Vehicles / Assets

Search [   ]   All Vehicles ▼   All Groups (Fleets) ⬍ | Export ELD Logs | Email ELD Logs | 8 day view ▼

Manage Features | Share Selected | ❓ | **Add New Vehicle or Asset** | Export Vehicles

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*.

Changes in Defect Processing

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- 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

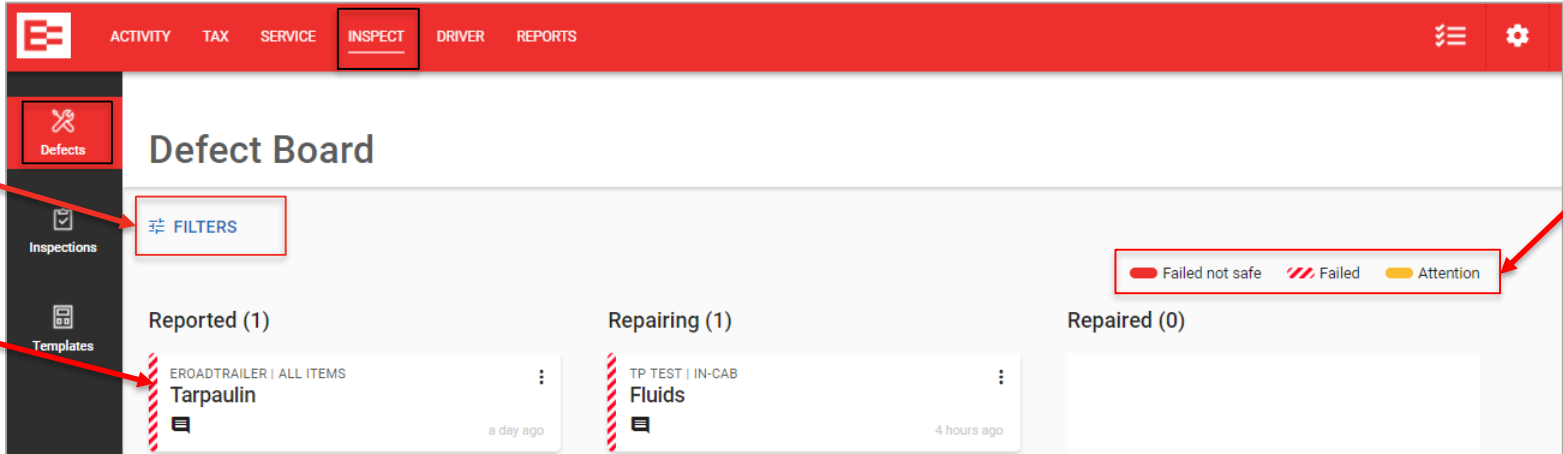- Slowly start bringing more drivers and vehicles onboard

Using Depot Inspect
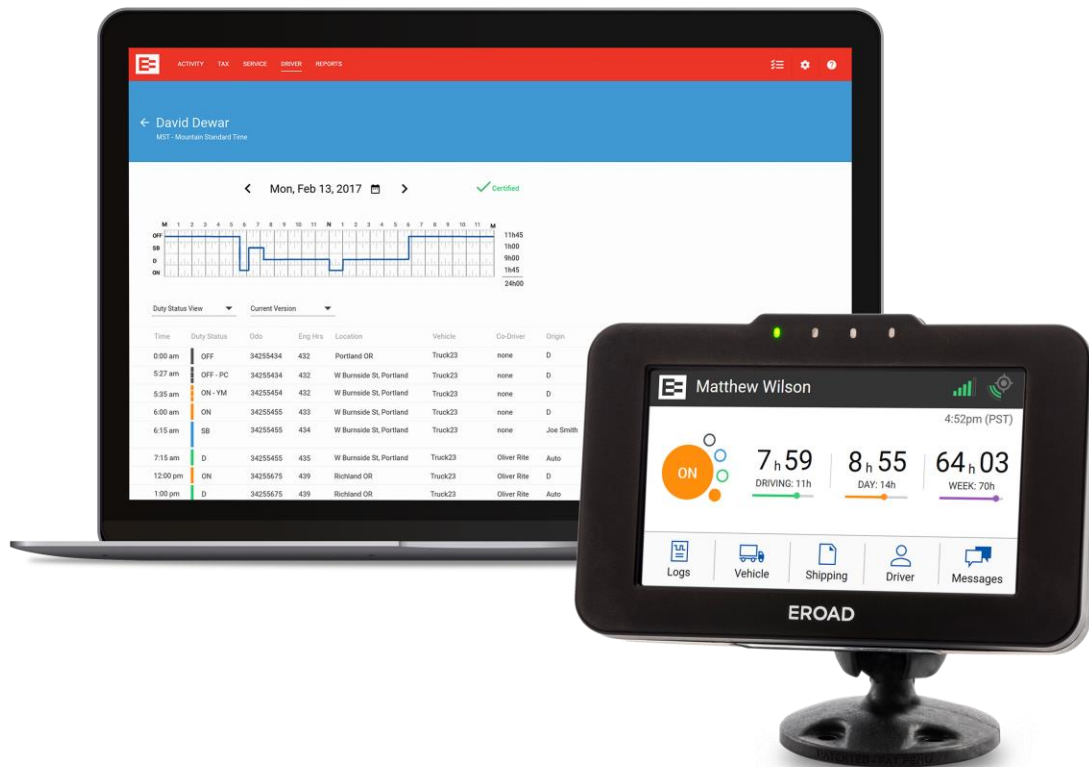
Accessing the Defect Board

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.
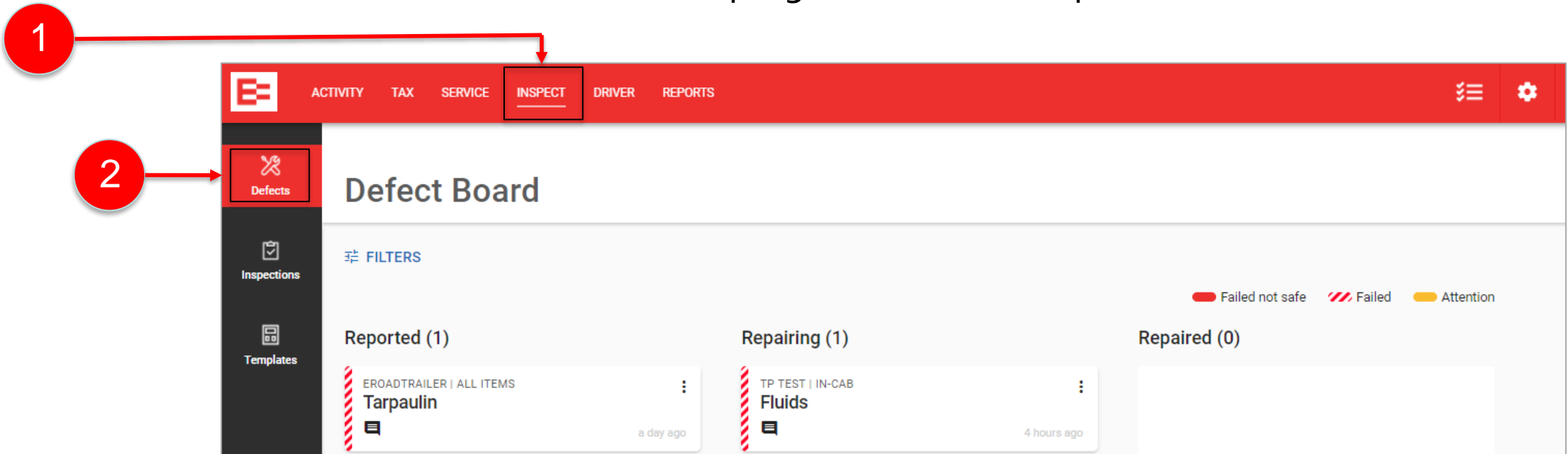
Managing Defects

- 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

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
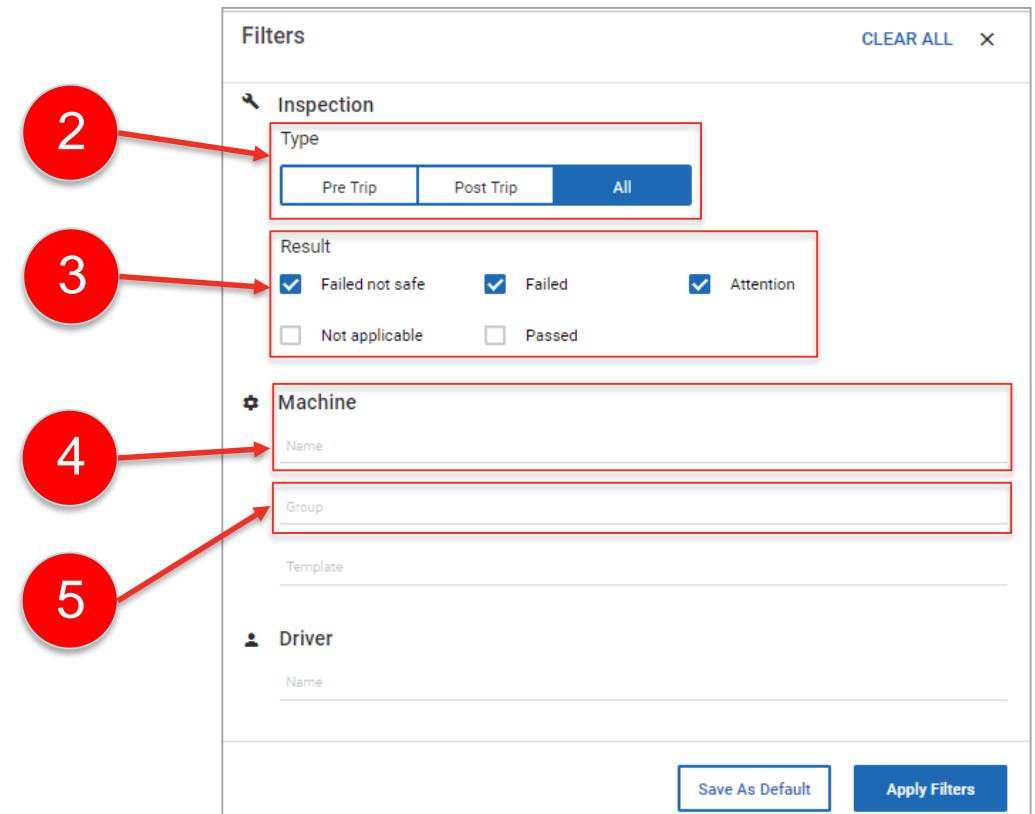
Filters

CLEAR ALL ✕

🔧 Inspection

Type

| Pre Trip | Post Trip | All |

Result

☑ Failed not safe   ☑ Failed   ☑ Attention
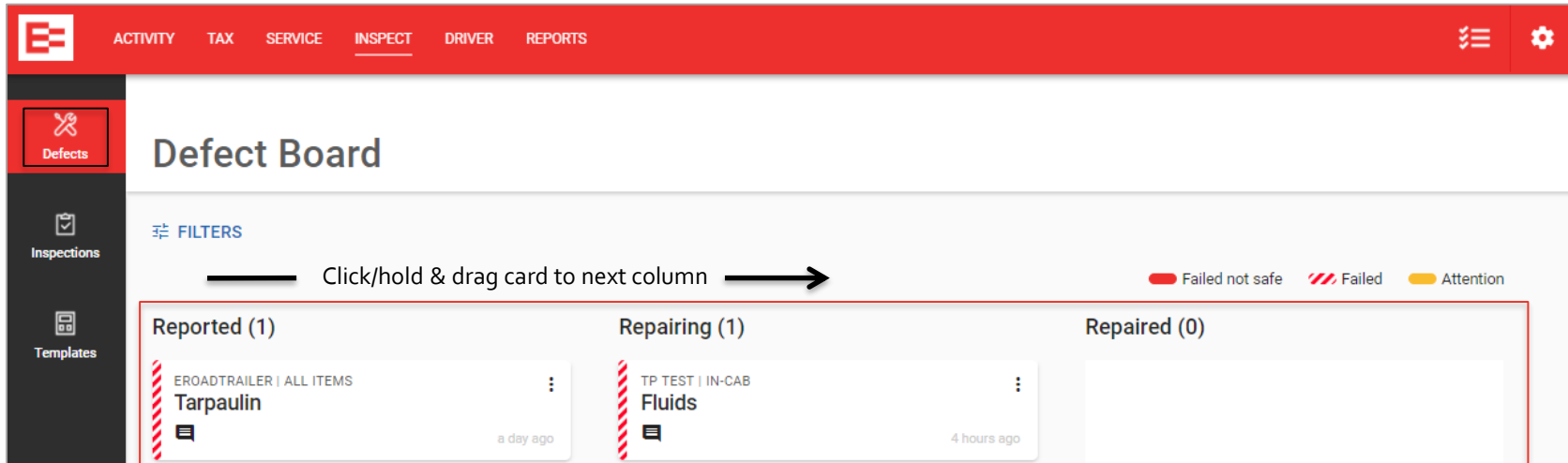☐ Not applicable   ☐ Passed

⚙ Machine

Name

Group

Template

👤 Driver

Name

Save As Default   Apply Filters

Filtering the Defect Board (continued)

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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.*

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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.

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
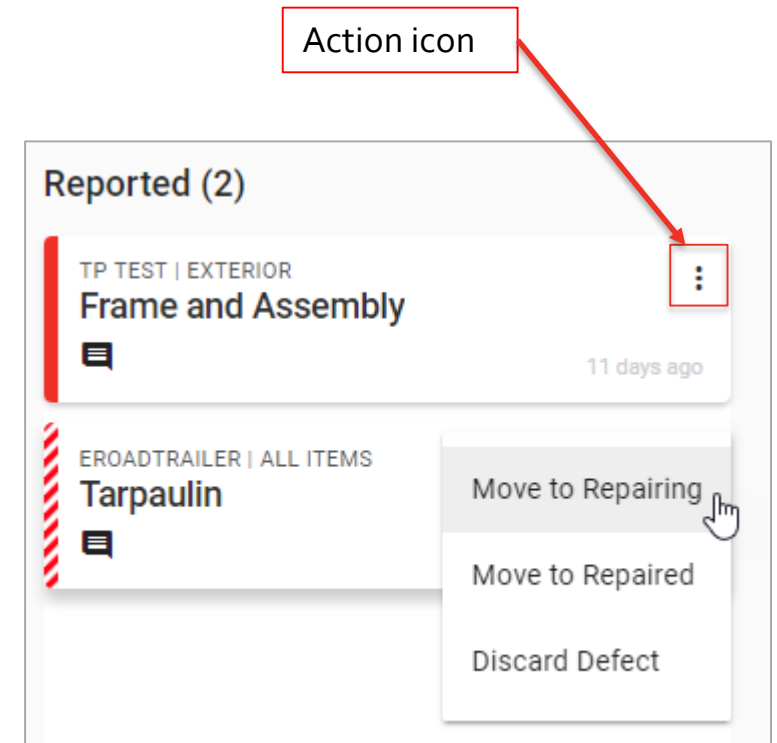 - They are moved to the *Repaired* column when completed

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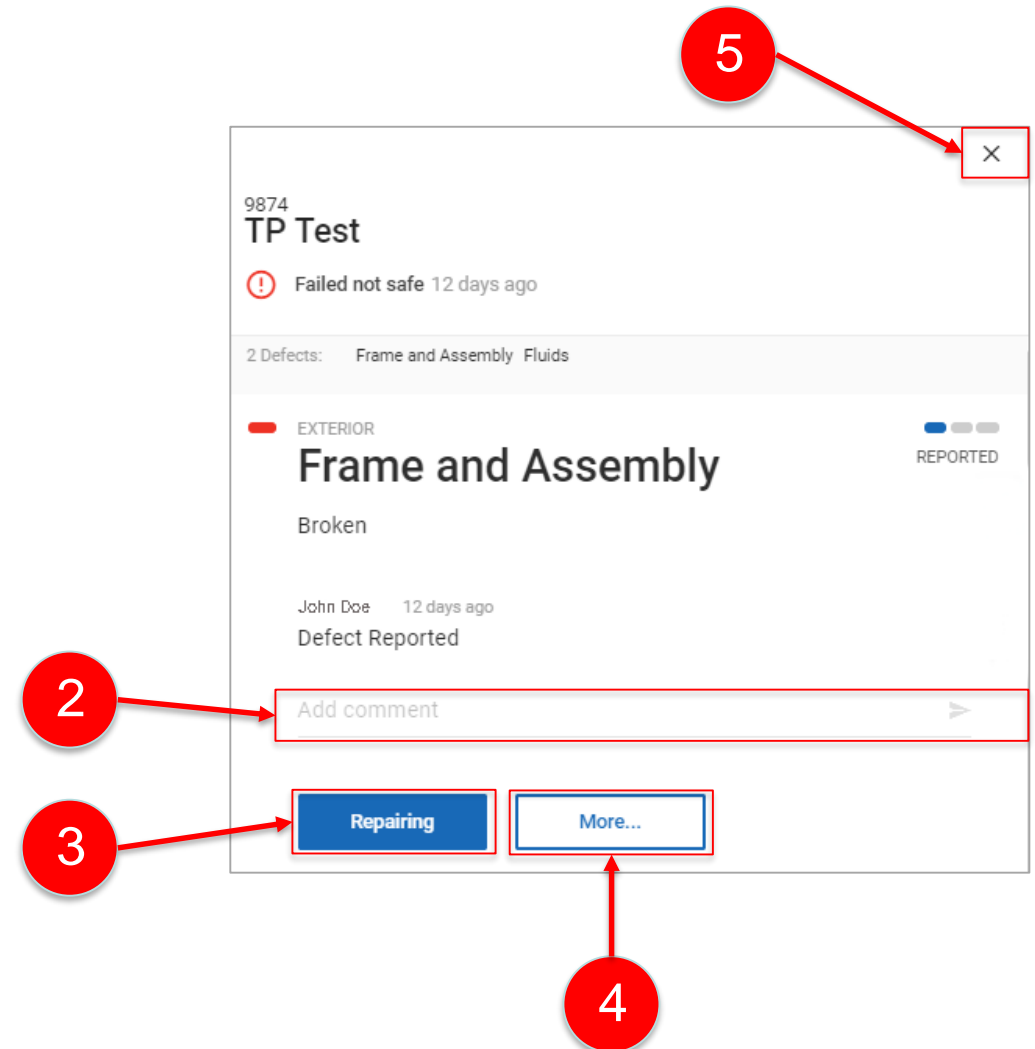
- Click the **Action** ⋮ icon to open the drop-down list and select one of the following actions:
  - **Move to Reported** — Moves the item to the Reported column
  - **Move to Repairing** — Moves the item to the Repairing column
  - **Move to Repaired** — Moves the item to the Repaired column
  - **Discard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

Action icon

Reported (2)

TP TEST | EXTERIOR
Frame and Assembly
11 days ago

EROADTRAILER | ALL ITEMS
Tarpaulin

Move to Repairing

Move to Repaired

Discard Defect

Viewing Defect Details
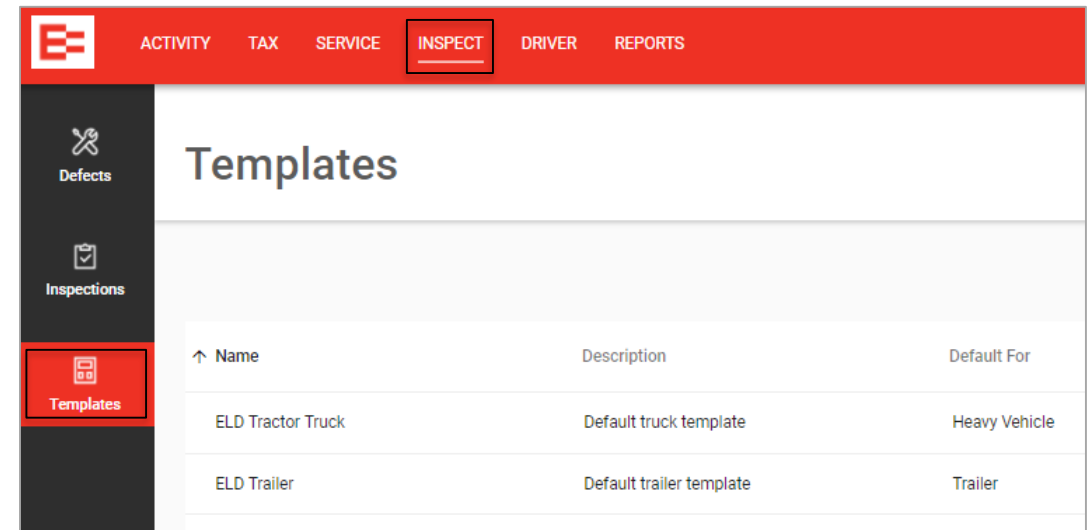
You can open defect items to view their details.

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.

9874
TP Test

Failed not safe 12 days ago

2 Defects: Frame and Assembly   Fluids

EXTERIOR
Frame and Assembly   REPORTED

Broken

John Doe   12 days ago
Defect Reported

Add comment

Repairing   More...

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
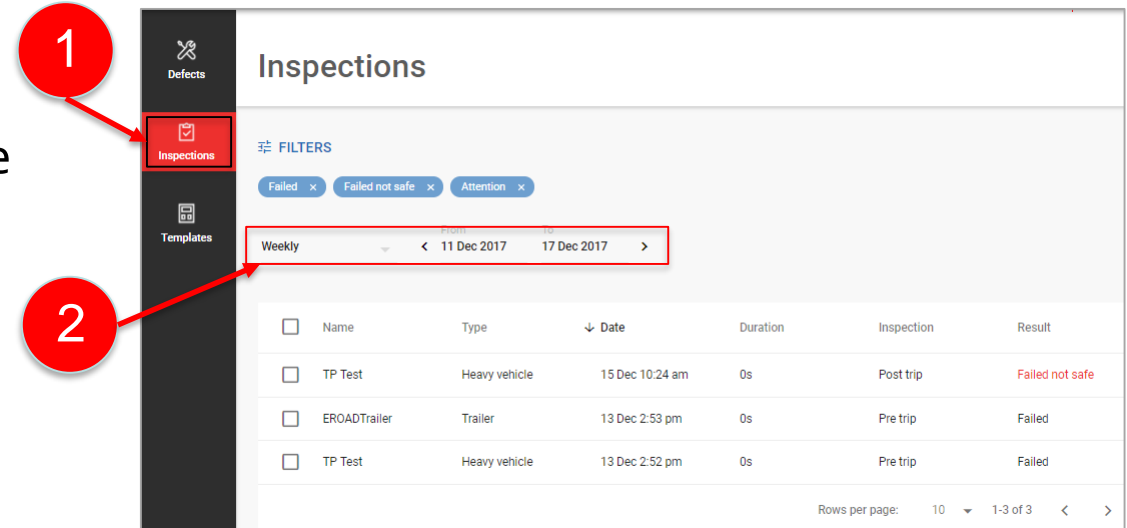
Viewing the Inspection List

- 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.

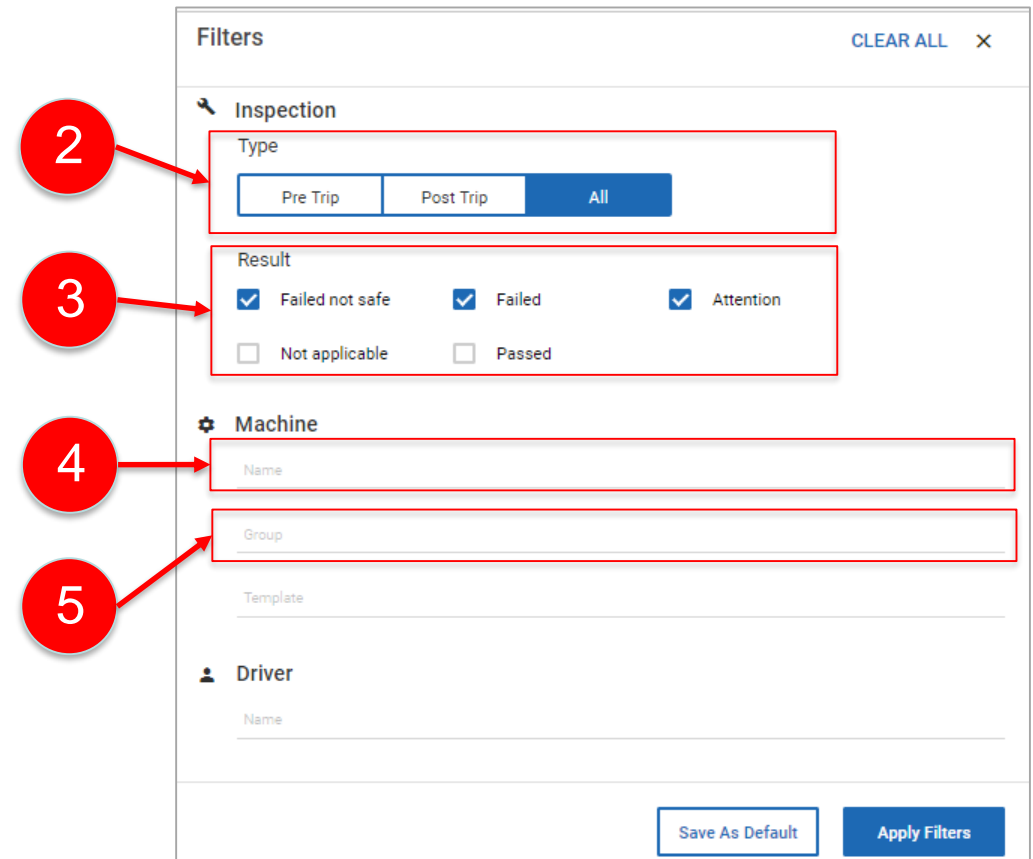# Filtering the Inspection List

- 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.

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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.

Filtering the Inspection List (continued)

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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.
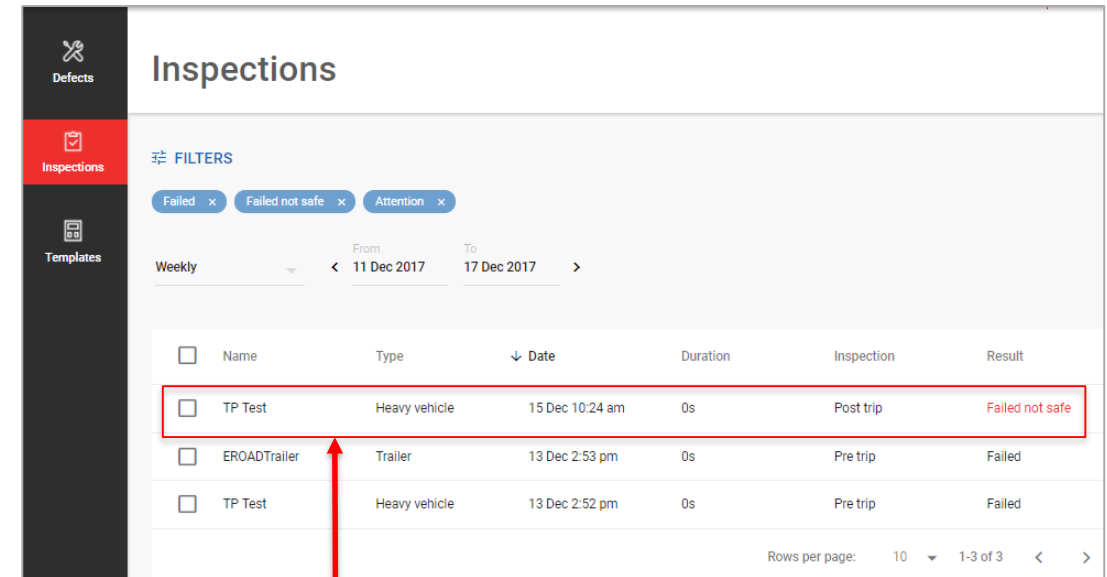
Viewing Inspection Details

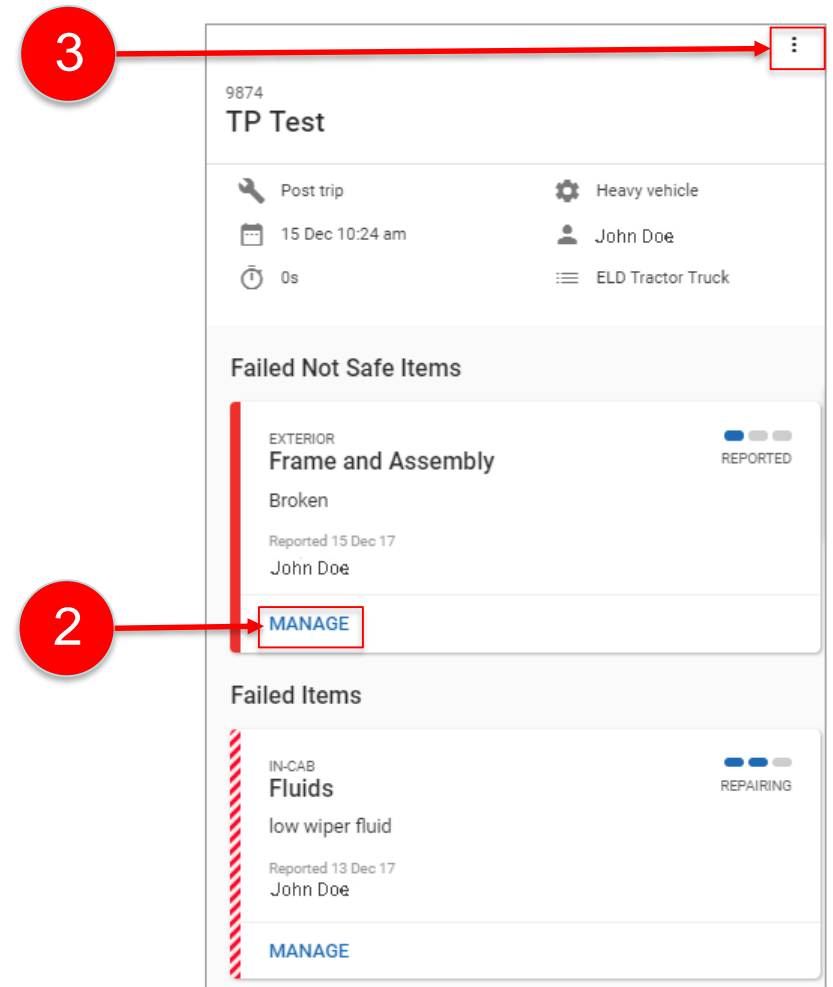1. Click on an **Inspection Name** in the list to open the Inspection dialog box.

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.

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.
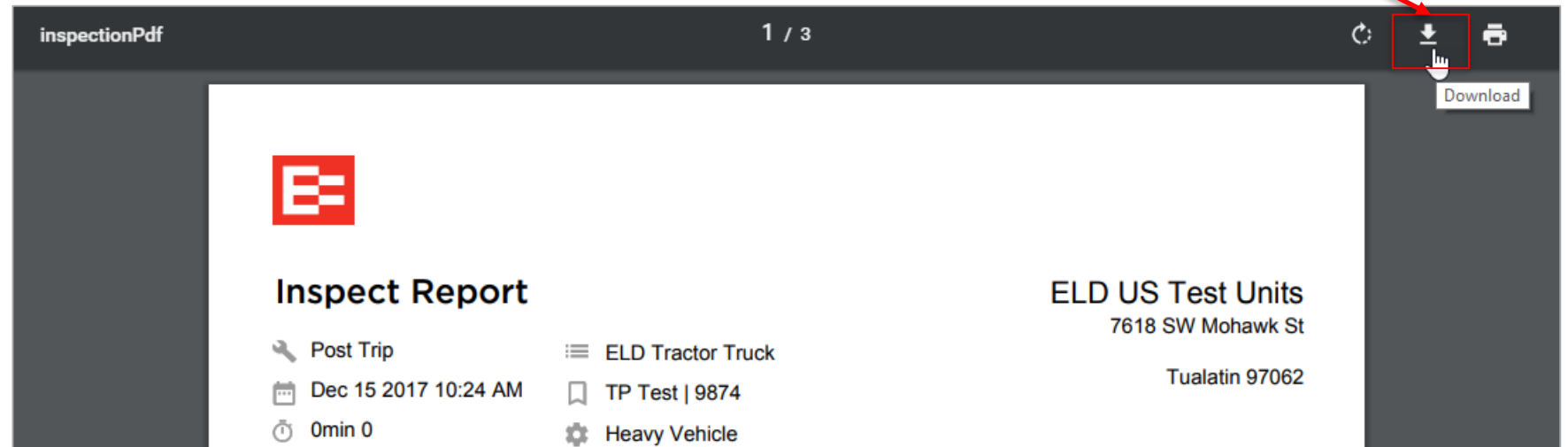
Printing an Inspection Report

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.
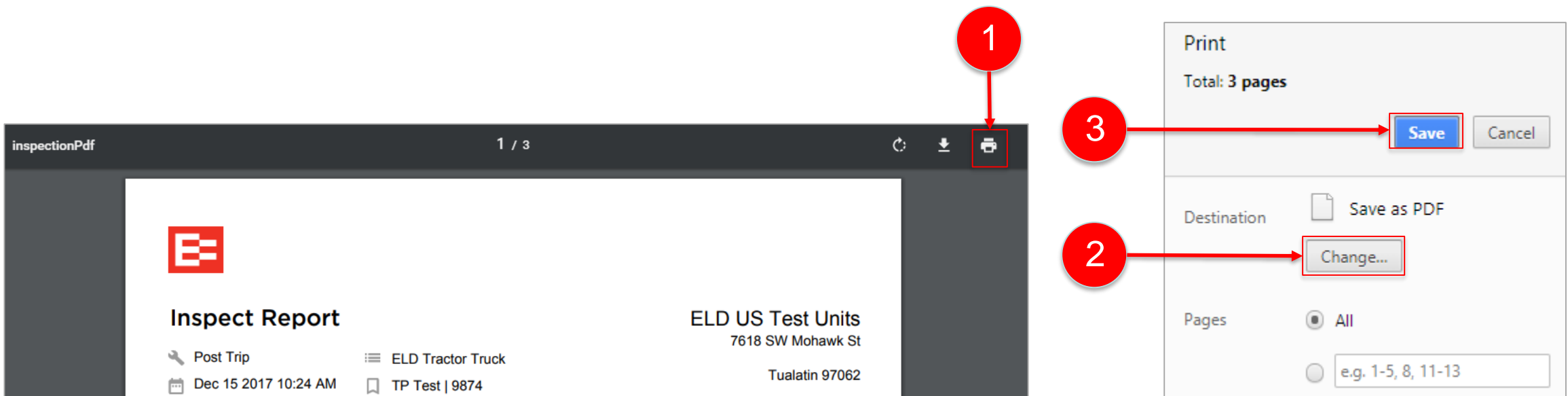
Summary

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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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