ENCOMPASS® DVIR & MOBILE APPLICATION

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Introduction

Overview

The current KellerMobile application is based around Hours of Service and requires hardware. A standalone DVIR application has been developed for fleets that wish to focus on vehicle maintenance and upkeep.

The DVIR application:

- requires no hardware
- includes timecard functionality (only available for customers not utilizing the Mandate version of Encompass)
- allows for customization of DVIRs, known as **Templates**, through Encompass

This solution is ideal for drivers that are not subject to Hours of Service regulations, but are required to meet vehicle inspection requirements.

> **ⓘ**   Note: Mobile screen shots may very slightly based on operating system

Before a customized DVIR, or **Template**, can be created, some initial setup must be completed, including creating categories and setting up vehicle inspection items. The upcoming sections will guide the user through setup and template creation.
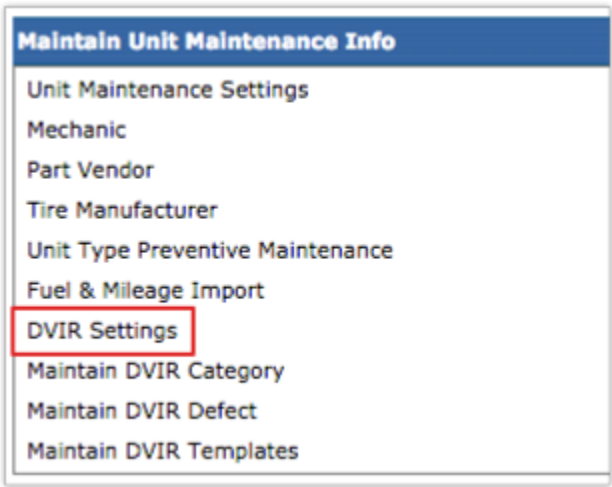
Encompass DVIR Setup

DVIR Settings

DVIR Settings is found by going to **Setup** in the drop down menu in the upper right hand corner.
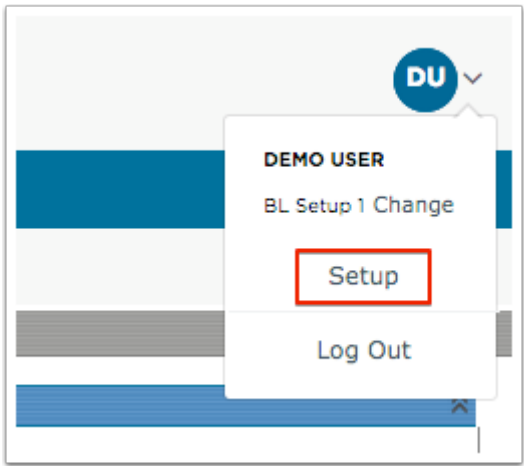
Click on **DVIR Settings** within the **Maintain Unit Maintenance Info** box. This box is located in the right column towards the bottom.

The settings are split up between the KellerMobile™ and the DVIR application. To change any of these settings, click **Edit** at the top.

- **Allow Driver to Complete Electronic DVIRs** enables or disables electronic DVIRs within the respective applications.
- **Generate Alert if PreTrip DVIRS Have Defects** enables or disables homepage alerts on Encompass for pre-trip inspections reporting defects.
- **Allow Driver to Complete Electronic Time Entry** enables or disables timesheets on the DVIR app <u>only</u>. This feature is only available for users not utilizing the mandate version of Encompass.
- **Default View** is for the DVIR application only and determines what screen is shown upon logging in, either vehicle inspections or timesheet.
- **Critical Out Of Service Defect E-Mail Alert** enables or disables an alert being sent to the administrator(s) if an out of service defect is reported.

View DVIR Settings

| Settings Edit...		
	Keller Mobile Settings	DVIR Settings
Allow Driver to Complete Electronic DVIRs	Yes	No
Generate Alert if Pre-Trip DVIRs Have Defects	Yes	No
Allow Driver to Complete Electronic Time Entry		No
Default View		DVIR
Out of service E-Mail Settings		
Enable Real-Time Out of Service E-Mail Alert		No

DVIR Categories

Items to check during a vehicle inspection can now be organized into categories. Categories are not required; if additional categories are not created, all defects would fall under the **General** category. Examples of categories could be:

- In Cab
- Exterior
- Passenger Side
- Driver Side
- Front
- Rear

The purpose of DVIR Categories is to allow a vehicle inspection to be split up into sections; to have a driver start at point A and end at point Z. These categories are setup by going to **Vehicle Management** and then selecting **Setup** from the drop down in the upper right hand corner.
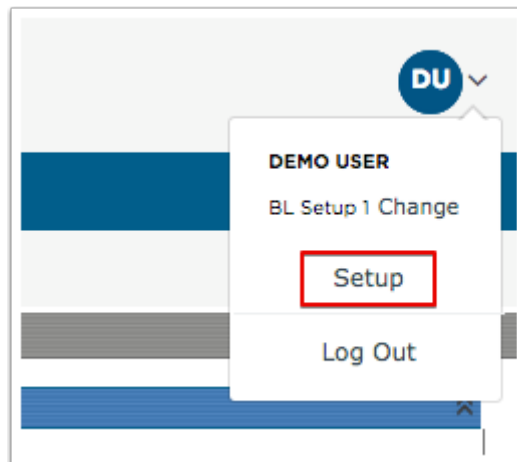
From there, select **Maintain DVIR Category** in the **Maintain Unit Maintenance Info** box. This box is located in the right column towards the bottom.
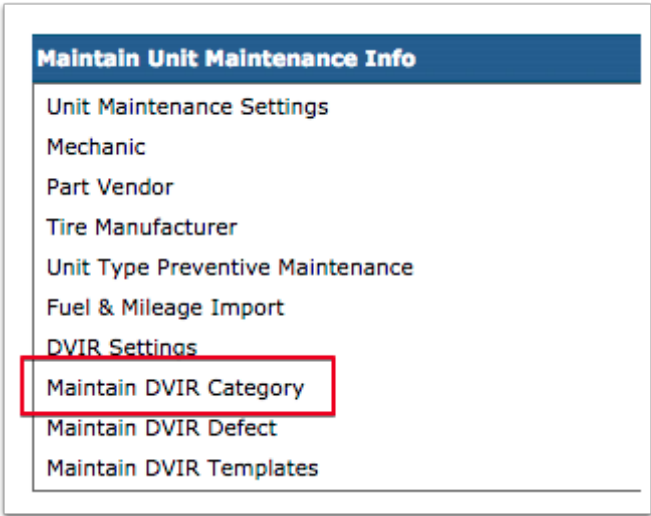
By default, this category list will be blank with the exception of **General**. This is the default category and cannot be removed. New categories can be added by clicking **Add DVIR Category Item** at the top.

Type in the name in which the category and click **Save**.

A message should be displayed in red at the top saying **DVIR Category information was successfully stored** and the new item should show at the end of the list.

If there is a particular order that a driver should complete these categories, they can be organized to meet those requirements. By clicking **Reorder DVIR Category Items** at the time, the order in which these items show up can be dictated. By highlighting the appropriate category and clicking the arrows on the right side of the box, the categories can be moved. Click **Save** once the categories are in the appropriate order.

Reorder Lookup - DVIR Category

Driver Side
Front
Passenger Side
Rear
In Cab
General

▲
▼

Save   Cancel

A message is shown at the top indicating **DVIR Category information was successfully stored** with the new order.

Maintain DVIR Category			
DVIR Category information was successfully stored.			

Add DVIR Category item   **Reorder DVIR Category items**

Lookup Item	Show In List?		
Driver Side	Yes	Edit	Del
Front	Yes	Edit	Del
Passenger Side	Yes	Edit	Del
Rear	Yes	Edit	Del
In Cab	Yes	Edit	Del
General	Yes	Edit	

DVIR Defects

The list of defects are found by going to **Vehicle Management** and then by going to **Setup** in the drop down menu in the upper right hand corner.
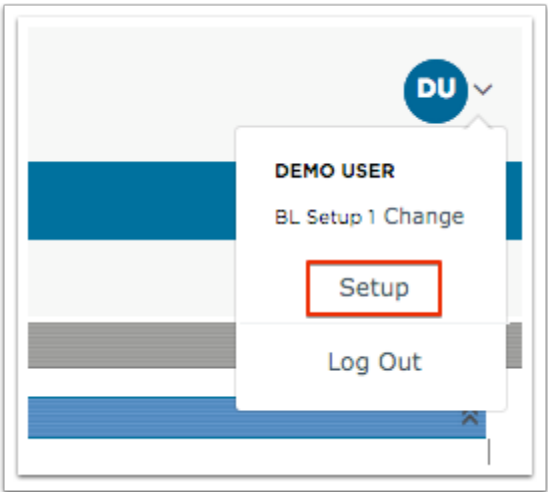
Click on **Maintain DVIR Defect** in the **Maintain Unit Maintenance Info** box. This is located in the right column towards the bottom.
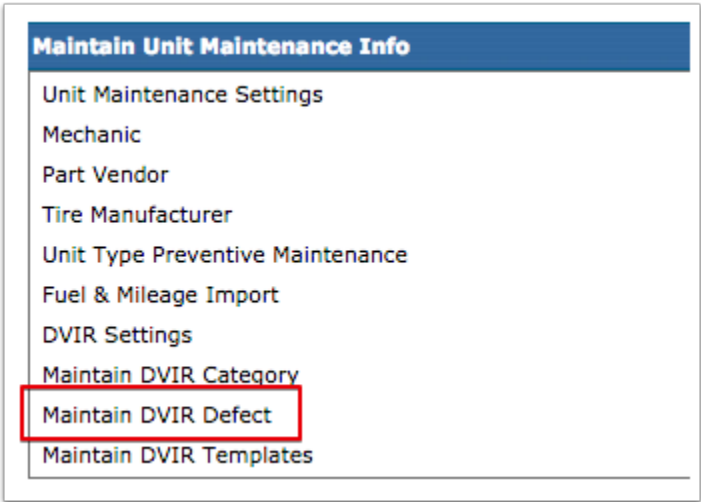
Encompass® already has a list of defects but additional items can be added to this, click **Add DVIR Defect Item** at the top.

Enter the name of the defect and click **Save**.

DVIR Templates

The DVIR templates are used to create uniform inspections for particular unit types. For example, the vehicle inspection for a pick-up truck would not be the same as a vehicle inspection for a tractor. These distinctions can be made using these templates. DVIR Templates are found by going to **Vehicle Management**, and then select **Setup** from the drop down menu in the upper right hand corner.
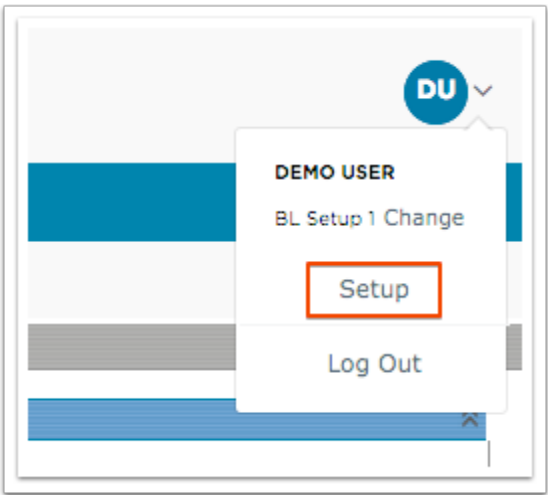
Click on **Maintain DVIR Templates** in the **Maintain Unit Maintenance Info** box. This box is in the right column towards the bottom.
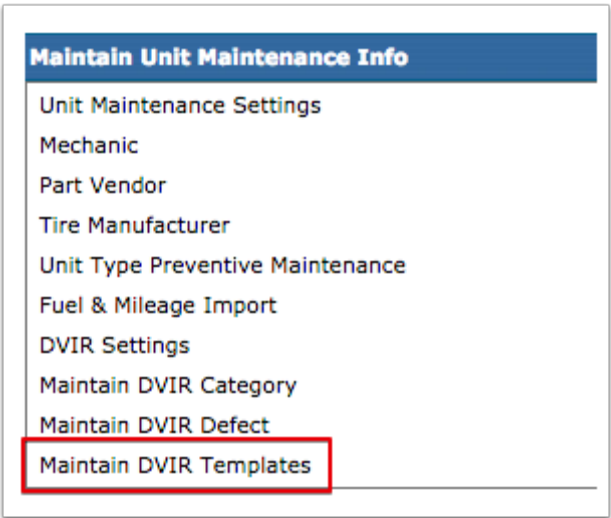
The list of existing templates will be listed here. To start with, a **Default** template has been created. To create a new template, click **Copy** on the far right side.

Maintain DVIR Templates				
DVIR Templates Created			**Show In List?**	
Default			Yes	Edit Copy

Enter a name for the new template. It could be something as simple as the unit type this is associated with (i.e. Tractor). Then, use the checkboxes to the left of each item to determine which items should be inspected for that unit type. Once the list has been created, they can be assigned to the categories using the drop down menu under **Category**. If an inspection item is essential in which the vehicle would be put out of service if found to have a defect, check the box on the far right for **Out of Service**. Continue going through this list until the necessary defects have been selected and categorized. If the checklist needs to be reordered, click **Reorder Checklist Items** at the top of the list.

> ⊘ If a defect is reported that is an **Out of Service** defect, the DVIR cannot be closed until that defect is resolved.

Edit UnitDVIR Template -

Enter Name for Template: _____

☑ Show In List?

Reorder Checklist Items   Select All   Unselect All

Select	Name	Category ⊕	Out of Service ⓘ
☑	Air Compressor	General	☐
☑	Air Lines	General	☐
☑	Battery	General	☐
☑	Body	General	☐
☑	Brake Accessories	General	☐
☑	Brake Connections	General	☐
☑	Brakes	General	☐
☑	Brakes, Parking	General	☐

If additional inspection items added to the system via **Maintain DVIR Defects**, they will be listed in the area beneath the check list items titled **Available Defects**. If the additional inspection item(s) should be added to the template, check the box(es) to the right of the inspection item and click **Add To Template**. If there are inspection items that should still be added, click **Add Defect** to add a new DVIR defect.

Once the template has been created, it then needs to be assigned to unit type(s). Use the check boxes to the left of each Unit Type listed to select the appropriate Unit Type(s) and then click **Save** at the bottom.

⚠   A Unit Type <u>cannot</u> be assigned more than one template.

Additional Navigation
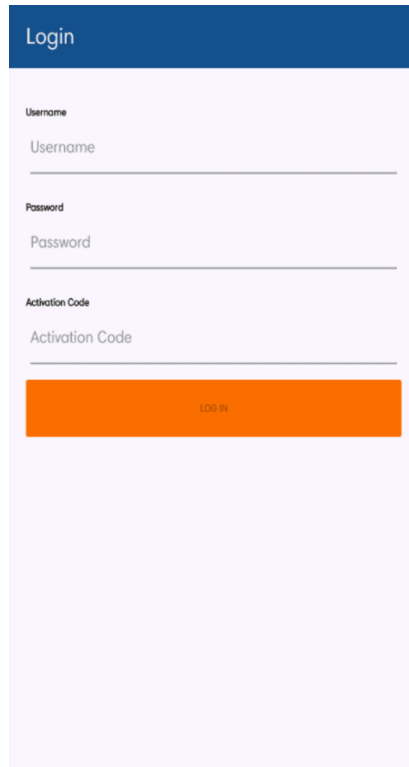
Each link for DVIR settings has been added to the landing page of **Unit Maintenance**. When going to **Vehicle Management > Unit Maintenance**, a box has been added to the left titled **DVIR Lookups**, which contain **Maintain DVIR Category, Maintain DVIR Defect, Maintain DVIR Templates,** and **DVIR Settings** as seen in **Vehicle Management > Setup**.
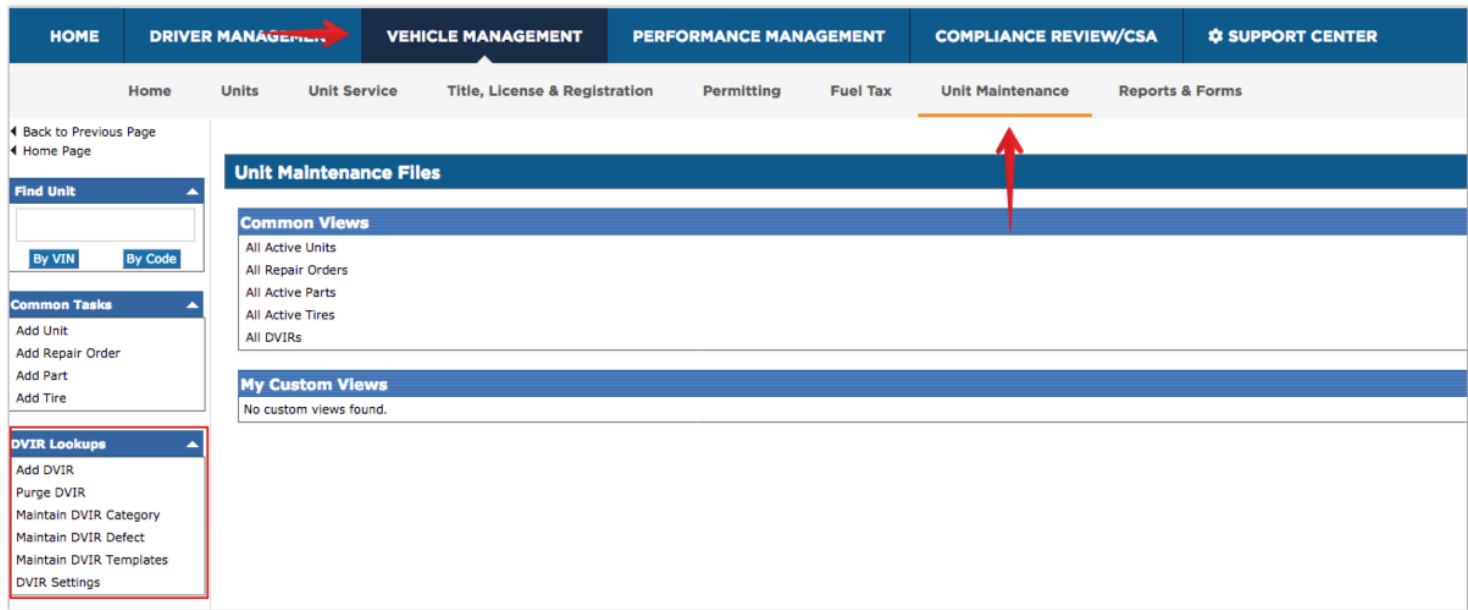
Mobile Application

Logging in and Submitting a DVIR

When the DVIR application is launched, the user will be prompted for their username and password. The username and password is created in Encompass via **Setup > Mobile User Logins**. The **activation code** is prompted for only on the first time logging in. The activation code is found in Encompass via **Setup > Mobile Company Settings**.

When they login for the first time, they will be prompted to accept terms and conditions. Once accepted, they will either be taken to the **Inspections** screen, or **Timesheet** screen, based on what is selected in **DVIR Settings** in Encompass.

Tap on **Select Unit** to select the appropriate unit for the inspection.
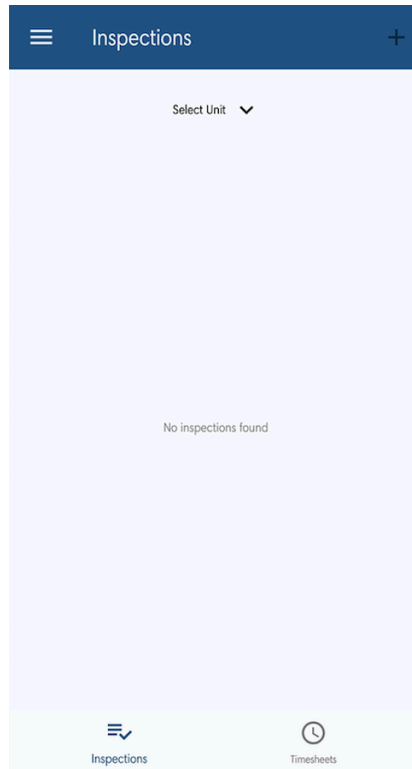
Use the search bar at the top, or select the appropriate unit from the list. This list of units are those entered within Encompass. If the unit is not listed here or cannot be found, then it has not been entered into Encompass.

Mobile Application

Once the unit is selected, press the **+** (plus sign) in the upper right hand corner, and select either pre-trip or post-trip, dependent on what kind of inspection is being done.

> 💡 **Note:** If a trailer has not been added to Encompass, a DVIR can still be completed for it. Enter in the trailer number. If the trailer number is not found in the list, it will indicate it is *untracked*. Once the driver submits the inspection, it will come into Encompass as an **Unassigned DVIR-Towed Unit** on the Vehicle Management Home Page under the Unit Maintenance Alerts.
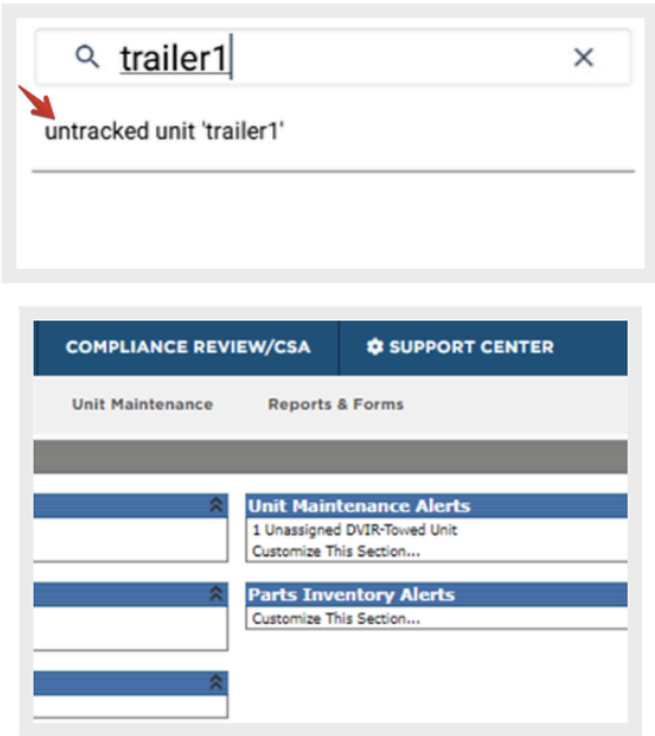
The following screen will have fields for the **Odometer**, **License Plate #**, and **Location**. None of these fields are required by the application, but different regulations may require these fields be entered.

Tap on the category name to view the inspection items within the category.

Mobile Application

Tap the circle to the left of the inspection item to mark them as satisfactory, filling the circle with a green checkmark.
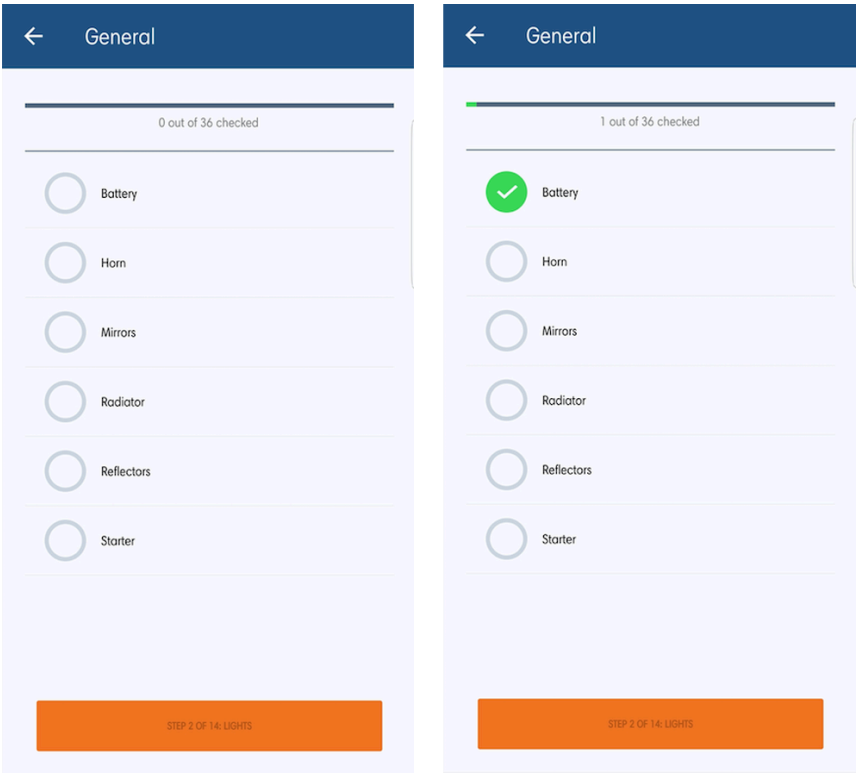
If a defect is found, tap on the name of the inspection item and a pop-up will allow the user to enter a remark. Enter in the necessary information and press **Add Defect**.

Mobile Application
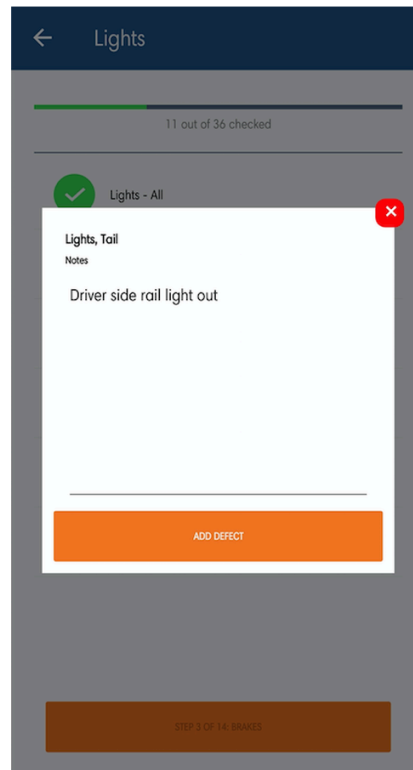
Once all items in a category have been marked as either satisfactory or defective, the orange button at the bottom will become active to mark the category as complete and move to the next category.
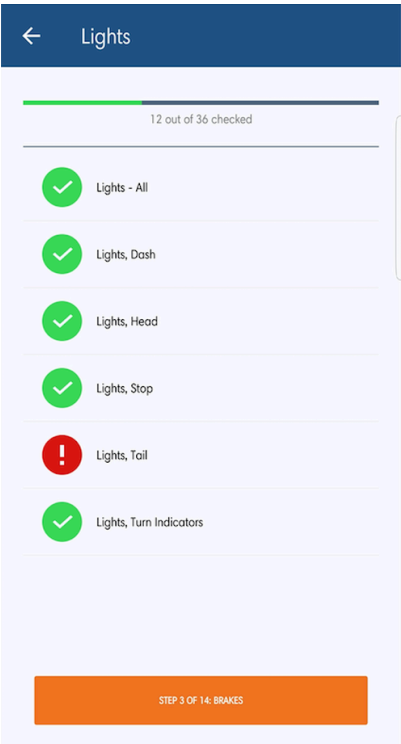
Once all categories have been marked as complete, the orange **Finish** button at the bottom will become active. Pressing **Finish** submits the inspection to Encompass. A confirmation message will display on the screen. Press **OK**.
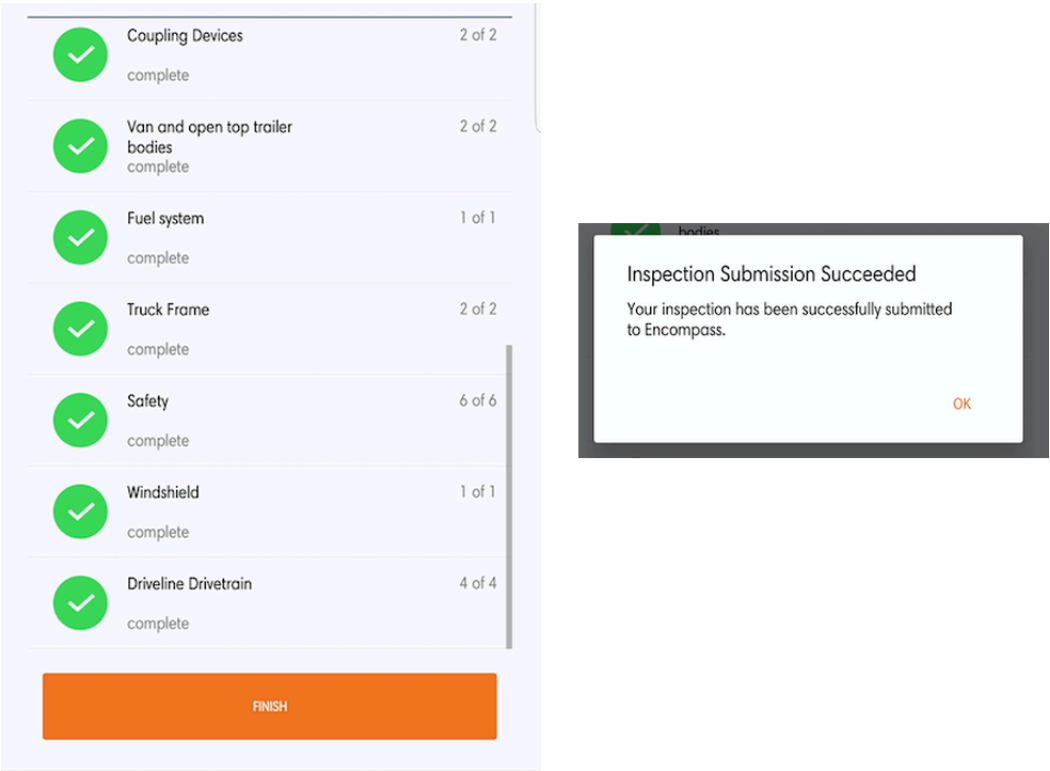
Reviewing Previous Inspections

After a vehicle is selected for inspection, any prior vehicle inspections reporting defects will be flagged with a red indicator. Tap on the inspection to review corrections and certify that the corrections were made.
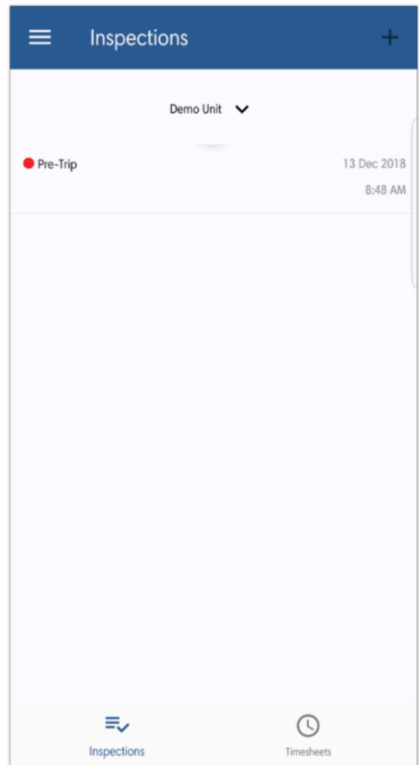
The inspection will show when the inspection was conducted, who indicated corrections were made, and when they were made, along with the item corrected. Tap **Certify and Submit** at the bottom to indicate that the corrections have been properly made.

> 💡   If the driver can correct the defect at the time of reporting it, they can certify that the defect was corrected on this page without having the Encompass Administrator indicate that corrections were made. The driver would tap **Certify and Submit** at the bottom to indicate that the corrections were made and have been certified by the driver.

Confirmation will display on the screen. Press **OK**.

Inspection Submission Succeeded

Your inspection has been successfully submitted
to Encompass.

OK
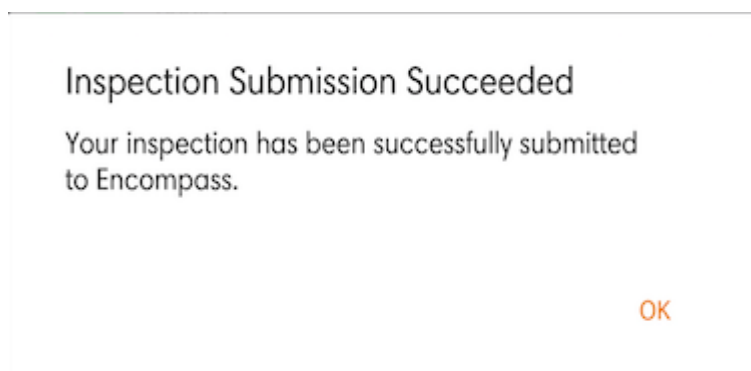
Timesheet

Timesheet functionality has been added to the DVIR mobile application which allows the user to clock in and out during the day to track their working time. This is <u>not</u> associated with any Hours of Service rules.

> ℹ️ **Note:** The timesheet feature is <u>not</u> available for users utilizing the Mandate version of Encompass.

Clocking In/Out and Submitting Timesheets

To utilize the timesheet, tap on the icon at the bottom called **Timesheets**. To view prior days, tap the date at the top to change the date. Tap **Clock in** to go on duty.
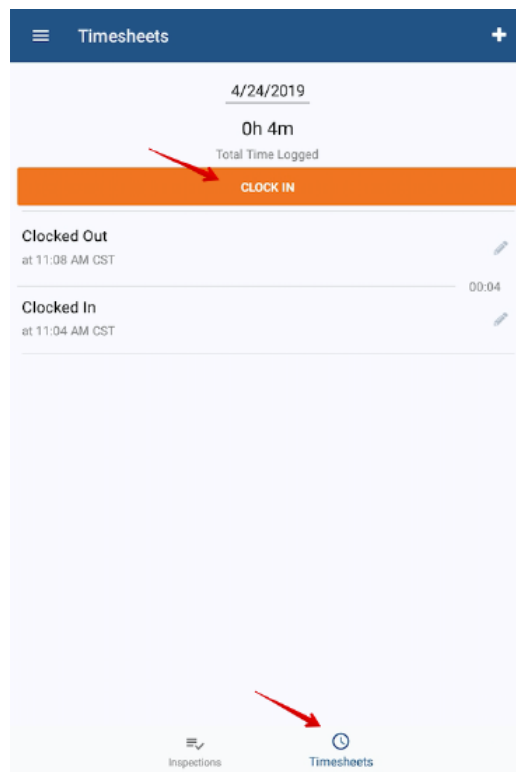
To stop tracking working time, tap **Clock Out.** Duty status changes for the day will be listed below the Clock In/Clock Out button. Once their day is complete, the user can submit their timesheet by logging out. Tap the menu in the upper left hand corner and select **Logout**.
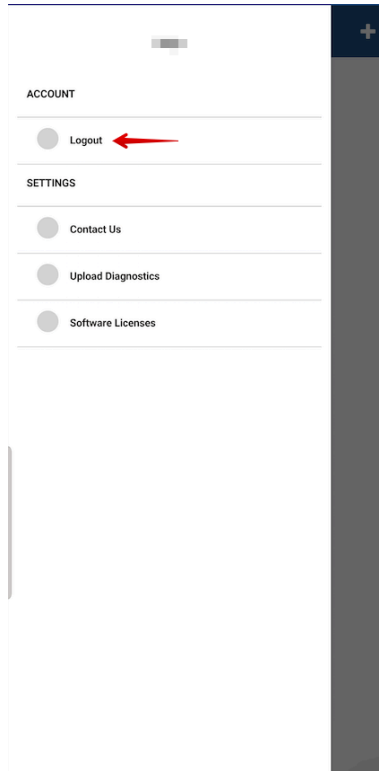
Editing Timesheets in DVIR Application

When viewing the clock in and clock out events, there is a pencil icon to the right of each event. Tap on the pencil to edit the event.
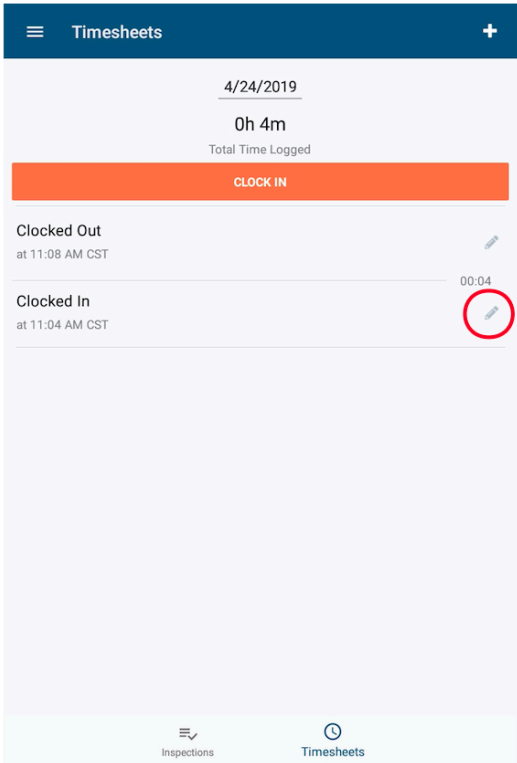
Tap on the time to edit it.

Change the time by using the analog clock or the keyboard. The icon in the lower left hand corner allows the user to toggle between the analog entry and keyboard. **Be sure to change AM/PM if necessary**. Once the time is set, tap **OK**.

Once the time is set appropriately, tap **Save** at the bottom.

The new time will be reflected accordingly.
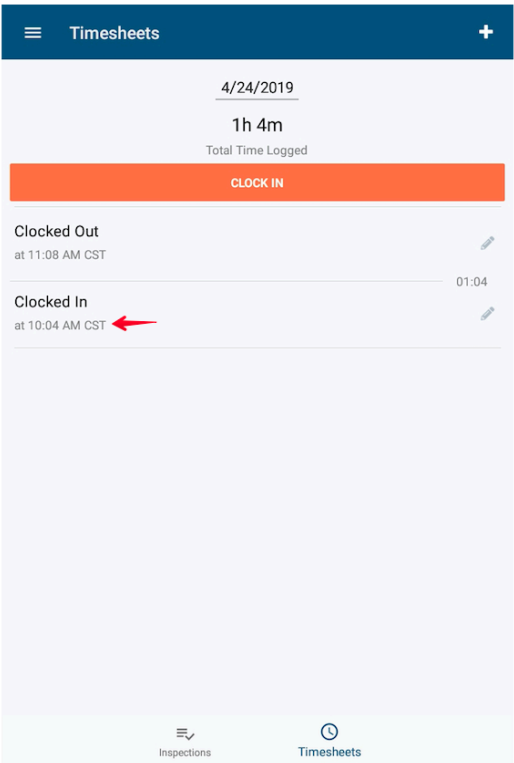
Timesheet View/Edit in Encompass

When a user logs out of the DVIR application (shown in the next section), the timesheet will submit to Encompass as an exempt log. Go to **Driver Management > Hours of Service**, search for the driver by either using the search box on the left or by selecting all **All Active Employees** under **Common Views.**
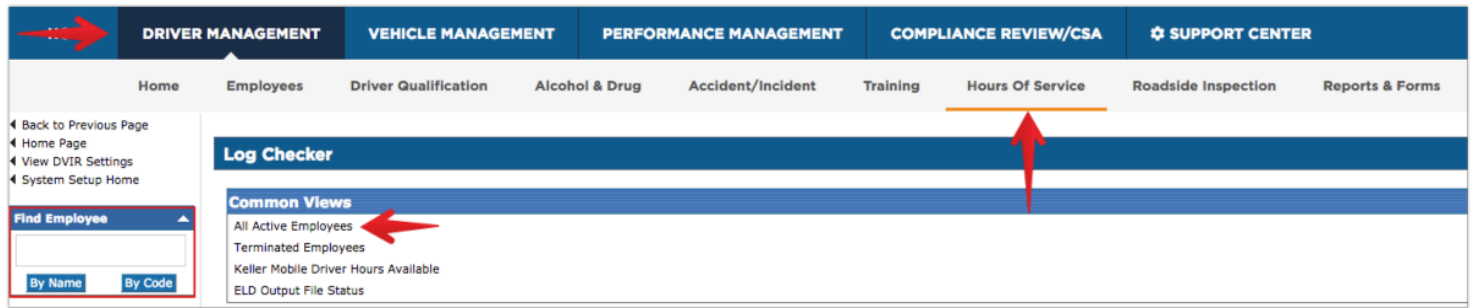
Click on the date of the log to review it. The log will show each individual clock in and clock out along with the total on duty and off duty hours.

Click **Edit** at the top of the log next to **Log Information** to make any corrections. Edit the times or duty statuses by using the drop down menus, or insert new duty statuses by using the line at the bottom, and pressing **Insert** on the right. Click **Save** at the top or the bottom of the screen to save the edits made.

Menu Functions and Logging Out

The **Menu** is found in the upper left hand corner.
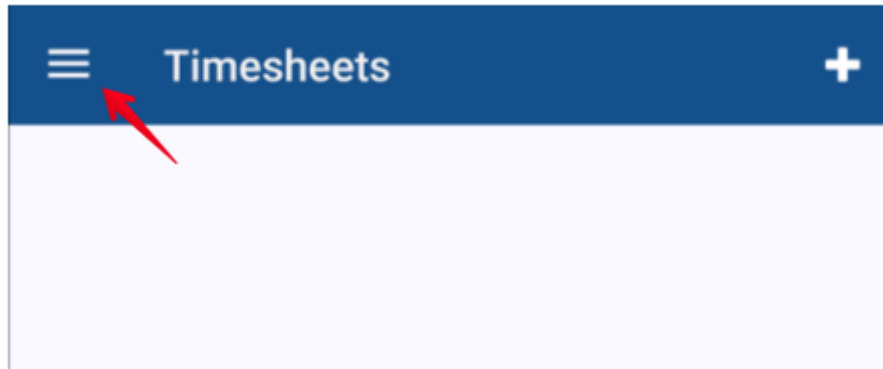
Logout is used to logout of the application. This will bring the user back to the login screen. Any timesheets created will be submitted upon logout.
Contact Us provides the phone number and email address to reach Client Service Support.
Upload Diagnostics is used by support for troubleshooting purposes.
Software Licenses provides licensure and copyright information.
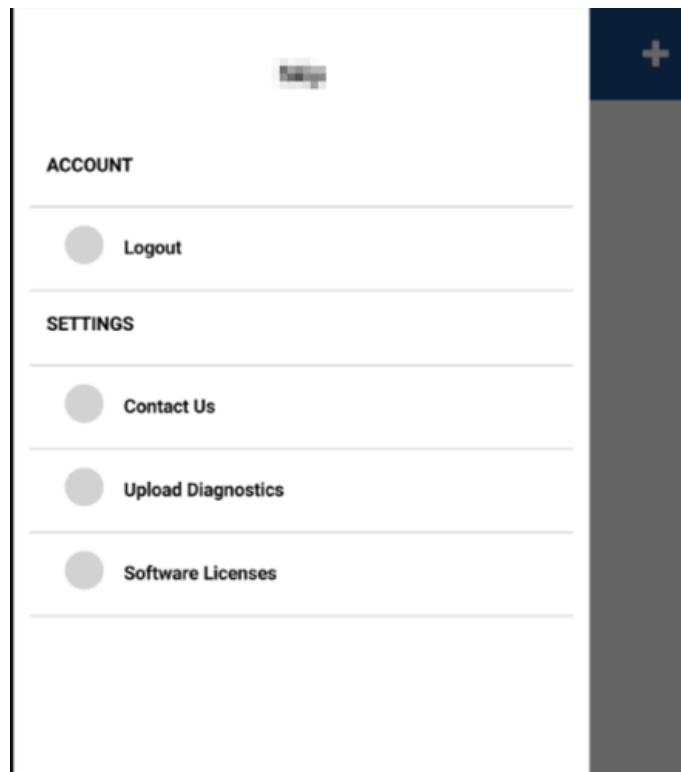
Reporting

DVIR Reporting

DVIR reports are found by going to **Vehicle Management > Reports & Forms**.

Scroll down and in the right column, under the heading for **Unit Maintenance Reports** are the DVIR reports. Common reports used are:

- **DVIR Defects Summary Report** - Prints of summary of reported DVIR defects.
- **DVIR Detail Report** - Prints DVIR information.

Timesheet Reporting

Timesheet reports can be found by going to **Driver Management > Reports & Forms**.
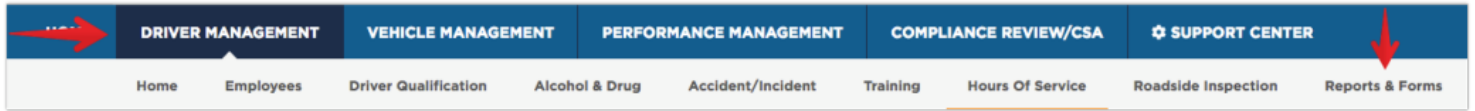
Towards the bottom of the page, in the left column will be a heading for **Log Checker Reports**. Common reports are:

- **Driver Summary** - Summarizes driver activity for a specified time period.
- **Employee Log** - prints employee logs.
- **Log Edits** - Lists log edits made to AOBRD logs.