

UNIT MAINTENANCE



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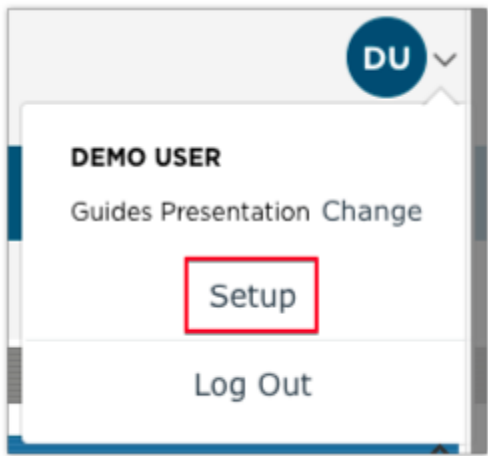
Vehicle Inspections (DVIRs)

DVIR Setup

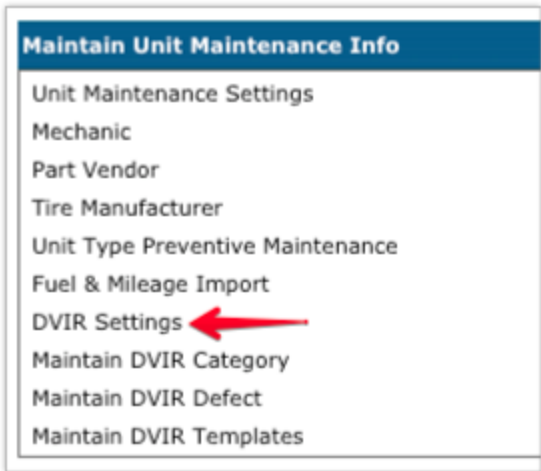
The Encompass® DVIR process has been enhanced to include the ability to customize DVIRs and break them down categorically, not only for any given company, but for specific unit types. This is accomplished by establishing DVIR categories and templates within the setup.

DVIR Settings

While in the **Vehicle Management** tab, click on the drop-down menu in the upper right hand corner and click **Setup**.



Scroll down to the **Maintain Unit Maintenance Info** box and click on **DVIR Settings**.





These settings are split up between the KellerMobile™ and the stand-alone DVIR application. To change any of these settings. Click **Edit** at the top.

- **Allow Driver to Complete Electronic DVIRs** - enables/disables electronic DVIRs within the respective applications
- **Generate Alert if Pre-Trip DVIRs have Defects** - enables/disables homepage alerts in Encompass for pre-trip inspections reporting defects
- **Allow Driver to Complete Electronic Time Entry** - **[DVIR Application ONLY]** enables/disables timesheets for AOBRD users (not available for ELD Mandate users at this time).
- **Default View** - **[DVIR Application ONLY]** determines what screen is shown upon login, either the vehicle inspections or timesheets. If this is an ELD account, this will ALWAYS be DVIR as timesheets are not available for ELD at this time.
- **Enable Real-Time Out of Service E-Mail Alert** - enables/disables an alert being sent to administrator(s) if an out of service defect is reported.

Once all necessary settings are established, click **Save**.

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
--	----

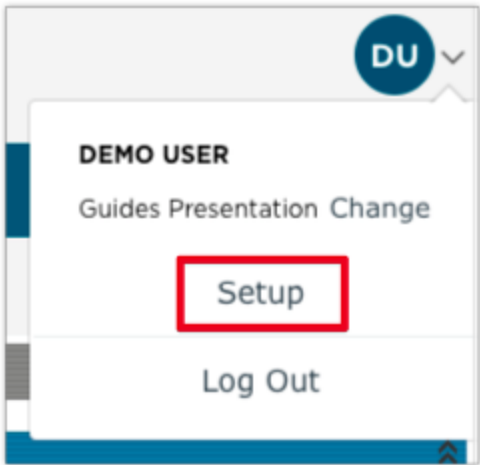
This setting enables your company to receive a real-time email when a DVIR is submitted with an out of service defect. To receive the email, select customize on your unit service alerts and check the Email option for Unit out Of Service.

DVIR Categories

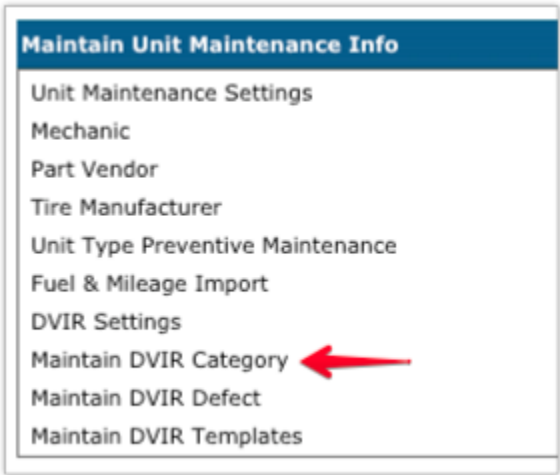
The purpose of DVIR categories is to allow a vehicle inspection to be split up into sections. This can help with the efficiency of completing an inspection, standardizes inspections, and helps break-down what may be perceived as a large task, into smaller ones.

The individual inspection items can be categorized if desired. Categories are *not* required. By default, all vehicle inspection items, including new ones added, will fall under the *General* category if no other categories are created.

To set up additional categories, click on **Setup** in the drop-down menu in the upper right hand corner of the **Vehicle Management** tab.



Scroll down to the **Maintain Unit Maintenance Info** box and click **Maintain DVIR Category**.



Vehicle Inspections (DVIRs)

As mentioned, there is a default category called *General* which cannot be removed. New categories can be added by clicking **Add DVIR Category Item** at the top.

Maintain DVIR Category

Add DVIR Category item

Reorder DVIR Category items

Lookup Item	Show In List?
General	Yes Edit

Enter the name of the category and click **Save**. Be sure that **Show in List?** is checked as this determines if it is an available category or not.

Add Lookup - DVIR Category

Shaded Fields are Required

Save

Cancel

Name

In Cab

☒ Show in List?

Save

Cancel

After each category is saved, it will take the user back to the category list page, with a success message displayed at the top. The new inspection category will then show at the bottom of the list.

Add DVIR Category item

Reorder DVIR Category items

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

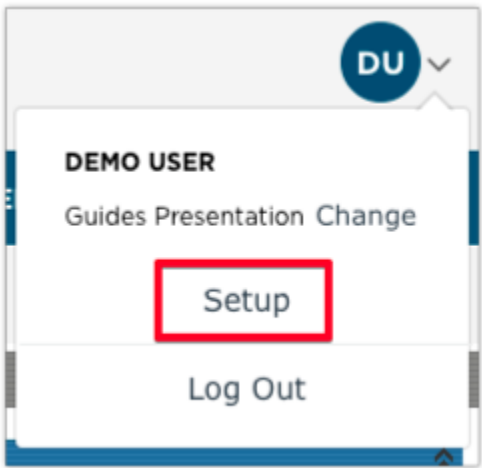
The order in which this list is organized will be displayed to the driver within the mobile applications. This list can be reorganized by clicking **Reorder DVIR Category Items** at the top of the list. Highlight the appropriate category and click the arrows to the right of the box to move the categories. Click **Save** once the categories are in the appropriate order.

The screenshot shows a web interface titled "Reorder Lookup - DVIR Category". It features a list of categories: "General", "Front", "Rear", "Passenger Side", "Driver Side", and "In Cab". To the right of the list are two blue buttons with white arrows, one pointing up and one pointing down, for reordering the items. At the bottom of the interface are two buttons: "Save" and "Cancel".

💡 There is no limit to the number of categories that can be created. Different types of units that require different categories can all be created here. Additionally, this area is for creating the categories, not adding the individual inspection items into the categories.

DVIR Defects

The list of available inspection items, or defects, is in **Setup** in the drop-down menu in the upper right hand corner from the **Vehicle Management** tab.



Scroll down to the **Maintain Unit Maintenance Info** box and click **Maintain DVIR Defect**.



Encompass already has a list of defects, but additional items can be added to it by clicking **Add DVIR Defect Item** at the top of the list.

Maintain DVIR Defect

Add DVIR Defect item

Lookup Item

Air Compressor

Air Lines

Battery

Body

Brake Accessories

Enter the name of the inspection item and click **Save**. Make sure that **Show in List?** is checked. If it is unchecked, this will not be an available inspection item to add to a template.

Add Lookup - DVIR Defect

Shaded Fields are Required

Save

Cancel

Name

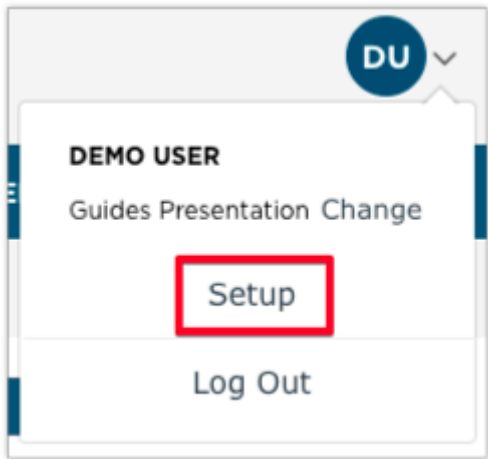
☒ Show in List?

Save

Cancel

DVIR Templates

DVIR Templates are used to create uniform inspections for specific unit types. For example, the vehicle inspection for a pick-up truck would not be the same as a vehicle inspection for a truck-tractor. These distinctions can be made using these templates. DVIR Templates are created by going to **Setup** in the drop-down menu in the upper right hand corner from the **Vehicle Management** tab.



Scroll down to the **Maintain Unit Maintenance Info** box and click **Maintain DVIR Templates**.



The list of existing templates will appear. To start with, a **Default** template has been created.

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

Notice that there isn't an **Add New...** at the top of the list of templates to create a new one. Instead, to create a new template, click **Copy** on the far right of the **Default** template.

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

Enter in a name for the new template. It could be something as simple as the unit type this is going to be associated with (i.e. Semi). *Note: Be sure that the **Show in List?** box is checked, otherwise this template will not display for the mobile user.*

Edit UnitDVIR Template -

Enter Name for Template:

☐ Show In List?

[Reorder Checklist Items](#)

[Select All](#)



[Unselect All](#)

Select	Name	Category	Out of Service
<input checked="" type="checkbox"/>	Air Compressor	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Air Lines	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Battery	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Body	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Brake Accessories	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Brake Connections	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Brakes	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Brakes, Parking	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Brakes, Service	General	<input type="checkbox"/>

The next section will display all of the inspection items. Use the checkboxes to the left of each item to determine if it should be included in this template. Then, assign them to a category using the drop-down menu. If an inspection item would render a vehicle out of service if found to have a defect, check the box on the far right for **Out of Service**. Continue working through this list until the necessary inspection items have been selected and categorized. If the checklist needs to be reordered, click **Reorder Checklist Items** at the top of the list.

! If an **Out of Service** defect is reported, the DVIR cannot be closed until the defect is resolved.

[Reorder Checklist Items](#) [Select All](#) [Unselect All](#)

Select	Name	Category 	Out of Service 
<input checked="" type="checkbox"/>	Air Compressor	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Air Lines	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Battery	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Body	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Brake Accessories	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Brake Connections	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Brakes	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Brakes, Parking	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Brakes, Service	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Clutch	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Coupling (King) Pin	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Coupling Devices	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Defroster/Heater	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Doors	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Drive Line	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Engine	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Exhaust	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Fifth Wheel	General	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Frame and Assembly	General	<input type="checkbox"/>

If additional inspection items were added to the system via **Maintain DVIR Defects**, they will be listed in the area beneath the checklist items titled **Available Defects**. If any of these items need to be added to the checklist, check the box to the left of the item and click **Add to Template**. If there were any additional inspection items that still need to be added, they can be added here by clicking **Add Defect**.


Available Defects

Add Defect

☐ Fuse

Add To Template

The very next section after the **Available Defects** is where the template is assigned to specified Unit Types. Check the box next to the unit type(s) this template should be assigned to. Click **Save** when complete.

 Notice the alert in red **Only one template can be created per unit type**. This means that any given unit type can only have ONE template assigned to it. A single template can be assigned to as many unit types as needed.

Available DefectsAdd Defect

☐ Fuse

Add To Template

Only one template can be created per unit type

Select Unit Type

Unit Type	Current Template Assigned
<input type="checkbox"/> (Not Specified)	Default
<input type="checkbox"/> Automobile	Default
<input type="checkbox"/> Bus	Default
<input type="checkbox"/> Charter Bus	Default
<input type="checkbox"/> Converter Gear	Default
<input type="checkbox"/> Double Bottom	Default
<input type="checkbox"/> Equipment Hauler	Default
<input type="checkbox"/> Farm Implement	Default
<input type="checkbox"/> Full Trailer	Default
<input type="checkbox"/> Motor Home	Default
<input type="checkbox"/> Pickup	Default
<input type="checkbox"/> Pickup Ford 550	Default
<input checked="" type="checkbox"/> Road Tractor	Default
<input type="checkbox"/> Semi-Trailer	Default
<input checked="" type="checkbox"/> Tractor	Default
<input checked="" type="checkbox"/> Truck	Default
<input checked="" type="checkbox"/> Truck-Tractor	Default
<input type="checkbox"/> Van	Default
<input type="checkbox"/> Wrecker	Default

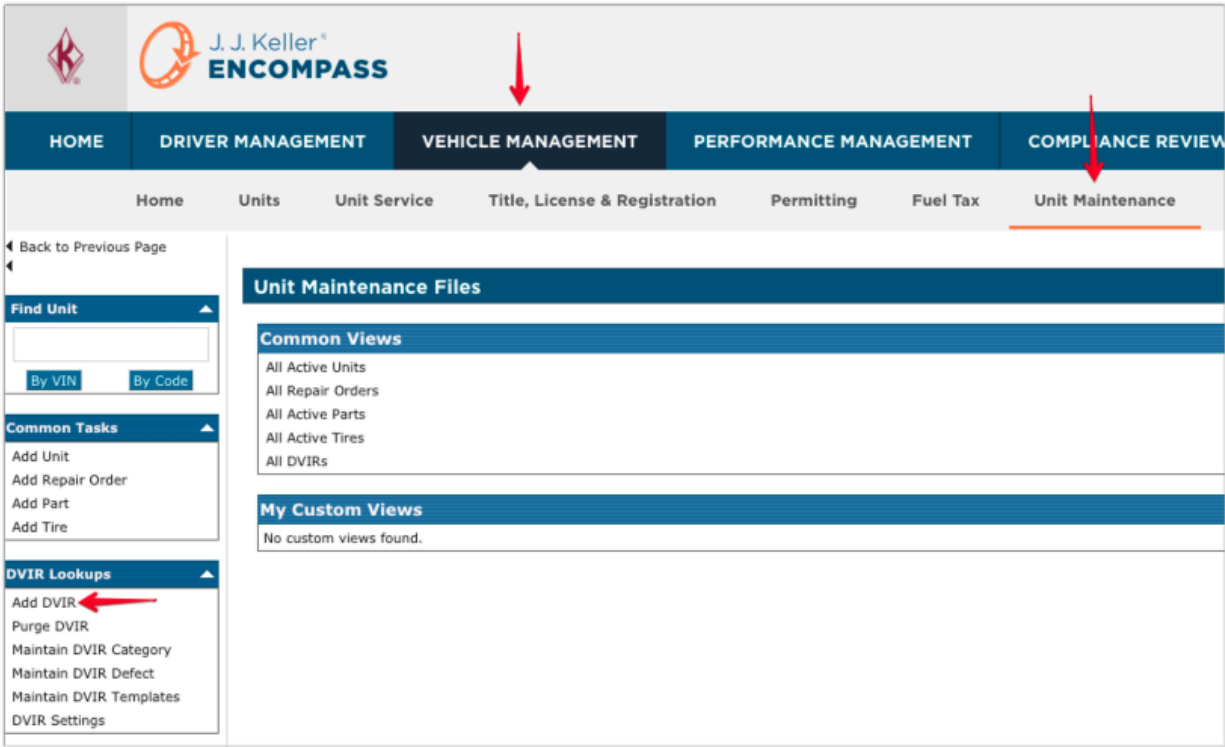
SaveCancel

Manually Entering a DVIR

Although drivers can enter DVIRs into the KellerMobile and DVIR applications, DVIRs can manually be entered into Encompass as well.

There are two ways to navigate to the screen to enter the DVIR.

- 1. Vehicle Management > Unit Maintenance > Add DVIR (on the left)



Vehicle Inspections (DVIRs)

2. Vehicle Management > Unit Maintenance > Find the Unit (via search on the left or by using a common view in the middle) > Click on the Unit Code to view the Unit Maintenance File > Click Add New... in the DVIRs section.

J. J. Keller® ENCOMPASS

HOME DRIVER MANAGEMENT VEHICLE MANAGEMENT PERFORMANCE MANAGEMENT COMPLIANCE REVIEW/CSA

Home Units Unit Service Title, License & Registration Permitting Fuel Tax **Unit Maintenance** Repo

Back to Previous Page

Unit Maintenance Files

Find Unit

By VIN By Code

Common Tasks

Add Unit
Add Repair Order
Add Part
Add Tire

Common Views

All Active Units
All Repair Orders
All Active Parts
All Active Tires
All DVIRs

My Custom Views

No custom views found.

Unit Maintenance

Add Unit

Select View: All Active Units Go Customize... Print

Unit Code	Description	Company Le
001	Heavy Hauler	Guides Pres
002	U002	Guides Pres
003	U003	Guides Pres
004	U004	Guides Pres
005		
006		
45678		

Related Areas

- Company Level List
- Purge Repair Orders
- Purge Parts
- Purge Cost Usage
- Purge Tires

Unit File

Unit Service File

Title, License & Registration File

Permitting File

Fuel Tax File

Common Reports

Entered Between: 3/26/2019 And: 4/25/2019 Go

Repair Orders Add New... Add Attachment...

Order Number	Date Entered	Date Started	Date Completed	Description	Last Edited
2	04/23/2019	04/23/2019	04/24/2019	Oil Change	User, Demo Edit Del

Between: 3/26/2019 And: 4/25/2019 Go

DVIRs Add New... Add Attachment...

Date	Time	Type	Driver Submitted
4/24/2019	2:00 PM	Post-Trip	Driver, CT Edit Del

Vehicle Inspections (DVIRs)

The first section of the DVIR entry screen allows the user to enter the basic information about the DVIR: Date, Time, whether it's a Pre- or Post-Trip, and Odometer Reading.

Add DVIR - 002

Shaded Fields are Required

Save

Cancel

Save & Add New

Save & Link Repair Order

Save & Link Out of Service Record

Daily Vehicle Inspection Detail

Date Completed:

4/24/2019

Time:

8

:

00

AM

Inspection Type:

Pre-Trip

Odometer:

154624

Unit Code: 002

Unit Type: Truck

Defects Found: No

Check any defects that need(ed) repair or check the box for Condition of the Above Vehicle is Satisfactory at the bottom of the page if there are no defective items.

General

☐ Air Compressor

☐ Air Lines

☐ Battery

☐ Body

☐ Brake Accessories

☐ Brake Connections

☐ Brakes

☐ Brakes, Parking

☐ Brakes, Service

☐ Clutch

☐ Coupling (King) Pin

☐ Coupling Devices

☐ Defroster/Heater

☐ Doors

☐ Drive Line

☐ Engine

☐ Exhaust

☐ Fifth Wheel

☐ Frame and Assembly

☐ Front Axle

☐ Fuel Tanks

☐ Hitch

☐ Horn

☐ Landing Gear

☐ Lights - All

☐ Lights, Dash

☐ Lights, Head

Driver Submission

☒ Condition of the Above Vehicle is Satisfactory


Submitting Driver:

Enter any notes needed for the inspection.

Notes

Driver Submission

☒ Condition of the Above Vehicle is Satisfactory

Submitting Driver: 

Save

Cancel

Save & Add New


Save & Link Repair Order

Save & Link Out of Service Record

To select the submitting driver, click the magnifying glass to the right of the field. In the pop-up window, select the appropriate driver.

Driver Submission

☒ Condition of the Above Vehicle is Satisfactory

Submitting Driver: 

Save

Cancel

Save & Add New

Filter Last Name:

Go

Employee Name ▲	Employee Code
Driver, CT	CT

1 2 3

Vehicle Inspections (DVIRs)

Click:

Save - to store the DVIR

Save & Add New - to store the DVIR and add another one

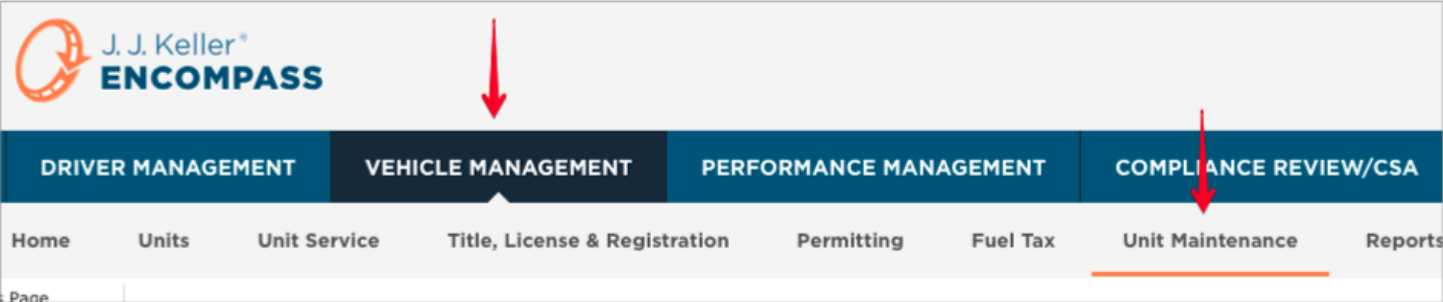
Save & Link Repair Order - to store the DVIR and link it to a repair order entered in Encompass

Save & Link Out of Service Record - to store the DVIR and link it to an out of service record entered in Encompass

Save	Cancel	Save & Add New	Save & Link Repair Order	Save & Link Out of Service Record
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View a DVIR

Pre-/Post-Trip Inspections, or DVIRs, are stored in the Unit Maintenance sub tab of Vehicle Management.

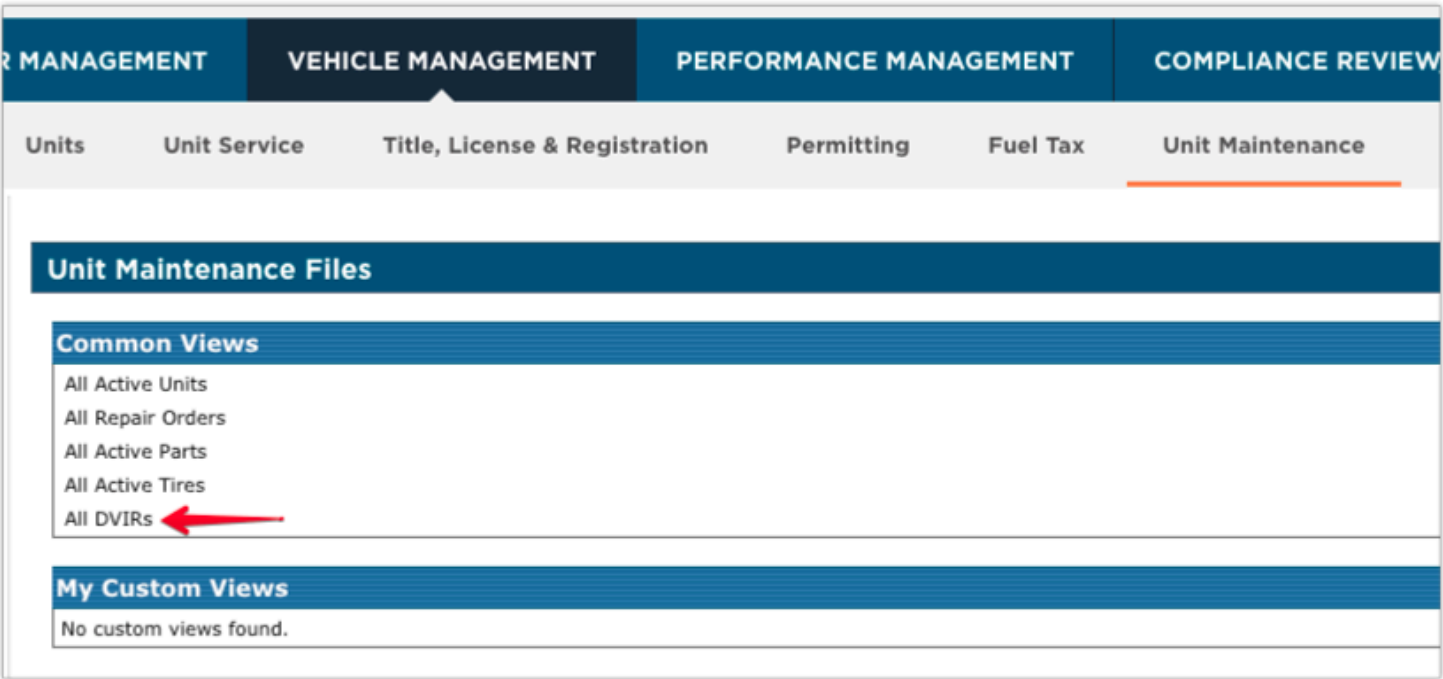


DVIRs can be looked up a couple of ways:

- 1. All DVIR Lookup
- 2. Unit Lookup to find associated DVIRs

All DVIR Lookup

Click All DVIRs under Common Views.



Vehicle Inspections (DVIRs)

Find the needed DVIR and click on the Date.

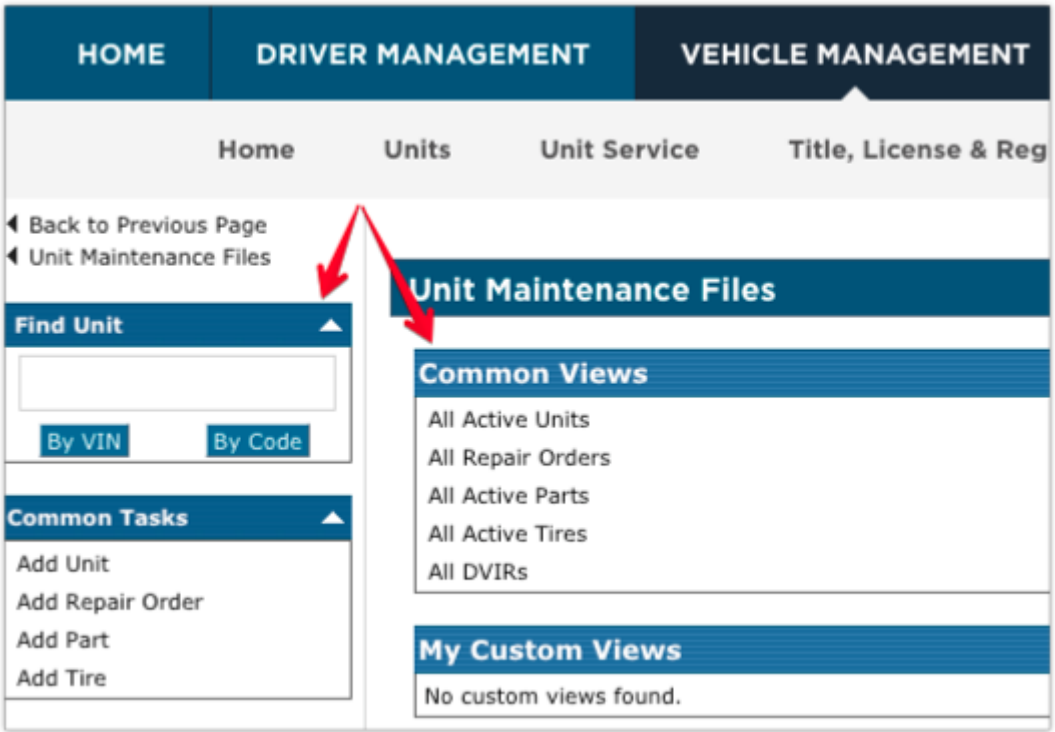
Unit Maintenance			
Add DVIR			
Select View:	All DVIRs	Go	Customize... Print
Date ▲	Time	Unit Code	Inspection Type
3/29/2012	10:00 AM	Veh3	Pre-Trip
2/2/2017	12:00 AM	001	Post-Trip
2/10/2017	8:00 AM	testunit1	Post-Trip
2/25/2019	1:14 PM	001	Pre-Trip
2/25/2019	1:15 PM	001	Pre-Trip
3/25/2019	10:27 AM	001	Pre-Trip
1 - 6			

The user will then be taken to the screen to view the DVIR.

View DVIR - 2/25/2019 Pre-Trip			
Unit Information Edit... ^			
Code:	001	Company Level:	Guides Presentation
Description:	Heavy Hauler	Unit Type:	Truck-Tractor
Make:	(Not Specified)	Model:	
Current Odometer:	55000	Current Hours:	
License Plate:	AAB-2512	Jurisdiction:	WI
Daily Vehicle Inspection Detail Edit... Add Attachment... ^			
Date Completed:	2/25/2019	Time:	1:15 PM
Inspection Type:	Pre-Trip	Odometer Reading:	55000
Defects Found:	Yes	Duration:	00:00:00
Inspection Location:			
General			
Battery	Resolved <input checked="" type="checkbox"/> Not Resolved <input type="checkbox"/>	Photos	Notes
		dead	
Notes			
Driver Submission			
<input type="checkbox"/> Condition of the Above Vehicle is Satisfactory			
Submitting Driver:			
Certification of Corrections			
Certified By:	Doe, John	Date:	2/25/2019
Review of Corrections			
Reviewing Driver:		Date:	2/25/2019

Unit Maintenance File Lookup

From the Unit Maintenance tab, find the unit using the search box on the left, or by clicking All Active Units under Common Views.



When the unit is found, click on the Unit Code to view the unit's maintenance file.

Unit Maintenance		
Add Unit		
Select View:	All Active Units	Go Customize... Print
Unit Code ▲	Description	
001	Heavy Hauler	G
002	U002	G
003	U003	G
004	U004	G
005	U005	G
006	U006	G

Vehicle Inspections (DVIRs)

The last section of this screen will list the DVIRs for the unit for the specified date range listed above. Click the Date of the DVIR.

View Unit Maintenance - 002

Unit Information [Edit...](#)
Code: 002 Company Level: Guides Presentation
Description: U002 Unit Type: Truck
Make: (Not Specified) Model:
Current Odometer: 156431 Current Hours:
License Plate: Jurisdiction:

Unit Preventive Maintenance Schedule [Add New...](#)

Description	Date Due	Increment Size	Hours	Miles
-------------	----------	----------------	-------	-------

Preventive Maintenance Due
Entered: Between: 3/25/2019 And: 4/24/2019 [Go](#)

Repair Orders [Add New...](#) [Add Attachment...](#)

Order Number	Date Entered	Date Started	Date Completed	Description	Last Edited
2	04/23/2019	04/23/2019	04/24/2019	Oil Change	User, Demo Edit Del

Between: 3/25/2019 And: 4/24/2019 [Go](#)


DVIRs [Add New...](#) [Add Attachment...](#)

Date	Time	Type	Driver Submitted	Edit	Del
4/24/2019	8:00 AM	Pre-Trip	Driver, CT		

Vehicle Inspections (DVIRs)

View the DVIR.

View DVIR - 4/24/2019 Pre-Trip			
Unit Information Edit... 			
Code:	002	Company Level:	Guides Presentation
Description:	U002	Unit Type:	Truck
Make:	(Not Specified)	Model:	
Current Odometer:	156431	Current Hours:	
License Plate:		Jurisdiction:	
Daily Vehicle Inspection Detail Edit... Add Attachment... 			
Date Completed:	4/24/2019	Time:	8:00 AM
Inspection Type:	Pre-Trip	Odometer Reading:	156431
Defects Found:	No	Duration:	
Inspection Location:			
No defects for this inspection			
Notes			
Driver Submission			
<input checked="" type="checkbox"/> Condition of the Above Vehicle is Satisfactory			
Submitting Driver:	Driver, CT		
Certification of Corrections			
Certified By:		Date:	
Review of Corrections			
Reviewing Driver:		Date:	

 *Note: This icon located to the left of the inspection indicates that the inspection was submitted by the driver from the mobile application. If this icon is not shown, it was manually entered by an Encompass user.*

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[Unit Maintenance Files](#)
[View DVIR - 2/25/2019 Pre-Trip](#)
Daily Unit Inspection
[Print DVIR](#)
[Change DVIR - Unit](#)

View DVIR - 3/25/2019 Pre-Trip

Unit Information

Edit...

Code:	001	Company Level:	Guides Presentation
Description:	Heavy Hauler	Unit Type:	Truck-Tractor
Make:	(Not Specified)	Model:	
Current Odometer:	55000	Current Hours:	
License Plate:	AAB-2512	Jurisdiction:	WI

Daily Vehicle Inspection Detail

Edit...

Add Attachment...

Date Completed:	3/25/2019	Time:	10:27 AM
Inspection Type:	Pre-Trip	Odometer Reading:	200
Defects Found:	No	Duration:	00:01:00
Inspection Location:			

No defects for this inspection

Notes

Driver Submission

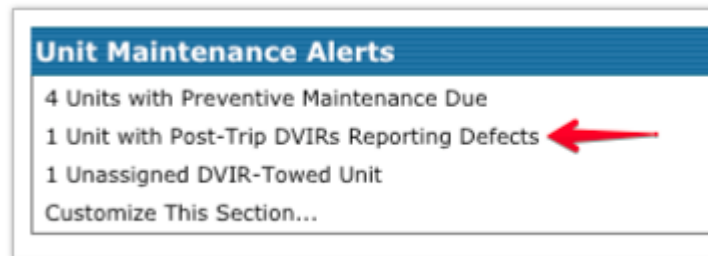
☒ Condition of the Above Vehicle is Satisfactory

Submitting Driver:

Handling a DVIR with a Defect

When there is a defect, typically, there is some type of repair and review performed and the repair is certified as corrected. The system mimics this process. If the repair was done **before** the DVIR is entered, the user can enter the information about the repair while the new DVIR is being entered. Otherwise, the user can come back to the DVIR at a later time to enter this information.

When a DVIR has been submitted with a reported defect, an alert will be generated on the Vehicle Management home page.

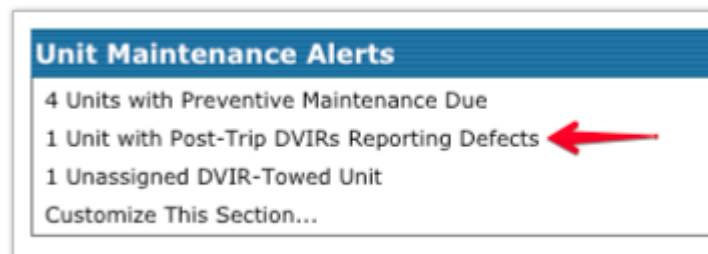


The DVIR with the defect can be navigated to in two methods:

1. The alert on the Vehicle Management Home Page
2. Navigating to the DVIR via Unit Maintenance

Navigating to the DVIR with Defect via Alert

Click on the alert for X Unit(s) with Pre-Trip (or Post-Trip) DVIRs Reporting Defects on the Vehicle Management home page.



Click on the Unit Code for the date and vehicle of the DVIR that's being cleared.

Unit Maintenance

Add Unit

Select View: Units with Post-Trip DVIRs Reporting [v] Go Customize... Print

Unit Code ▲

Most Recent DVIR With Defects

002 ←

4/24/2019 2:00:00 PM

1 - 1

The user will be taken to the Unit Maintenance file for the unit. The outstanding DVIR will be in red.

View Unit Maintenance - 002

Items marked in red have raised the "Units With Post-Trip DVIRs Reporting Defects" alert.

Unit Information Edit...

Code: 002 Company Level: Guides Presentation

Description: U002 Unit Type: Truck

Make: (Not Specified) Model:

Current Odometer: 156431 Current Hours:

License Plate: Jurisdiction:

Unit Preventive Maintenance Schedule Add New...

Description Date Due Increment Size Hours Miles

Preventive Maintenance Due

Entered Between: 3/25/2019 And: 4/24/2019 Go

Repair Orders Add New... Add Attachment...

Order Number Date Entered Date Started Date Completed Description Last Edited

2 04/23/2019 04/23/2019 04/24/2019 Oil Change User, Demo Edit Del

Between: 3/25/2019 And: 4/24/2019 Go

DVIRs Add New... Add Attachment...

Date Time Type Driver Submitted Edit Del

4/24/2019 2:00 PM Post-Trip Driver, CT Edit Del

4/24/2019 8:00 AM Pre-Trip Driver, CT Edit Del

Navigating to the DVIR with Defect via Unit Maintenance

See [View a DVIR](#).

Completing a DVIR with a Defect

Click **Edit** next to the DVIR. The Edit DVIR page will be displayed.

Each defect listed will have the option for select them as **Resolved** or **Not Resolved**. If there are multiple items on the inspection and only some of them have been resolved, but others have not, they can be marked and saved, and the DVIR can be returned to later to finish completing the DVIR.

Whoever certified that the corrections were made (a mechanic perhaps), should be entered in the **Certified By** field along with the date the corrections were certified.

The driver then needs to complete an inspection to verify that the corrections were made. Use the magnifying glass next to the field to select the driver and enter the date in which the driver reviewed the corrections.

Click **Save** once all necessary information is entered.

Edit DVIR - 4/24/2019 Post-Trip

Shaded Fields are Required

Save Cancel

Daily Vehicle Inspection Detail

Date Completed: 4/24/2019 Time: 2:00 PM

Inspection Type: Post-Trip Odometer: 21354

Unit Code: 002 Unit Type: Truck Defects Found: Yes

General	Resolved	Not Resolved	Photos	Notes
Battery	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Horn	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Notes

Enter Note Here

Driver Submission

Condition of the Above Vehicle is Satisfactory

Submitting Driver: Driver, CT


Certification of Corrections

Certified By: Joe Mechanic Date: 4/24/2019

Review of Corrections

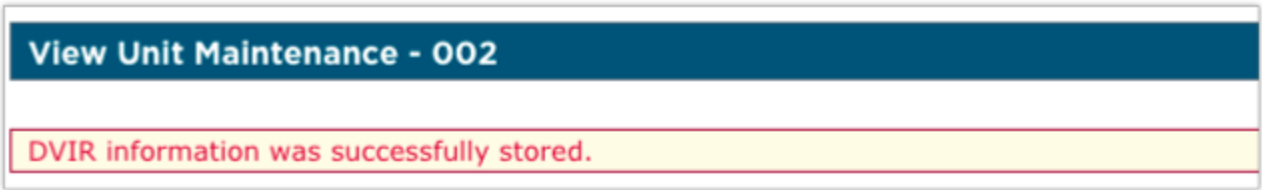
Reviewing Driver: Driver, CT Date: 4/24/2019

Save Cancel

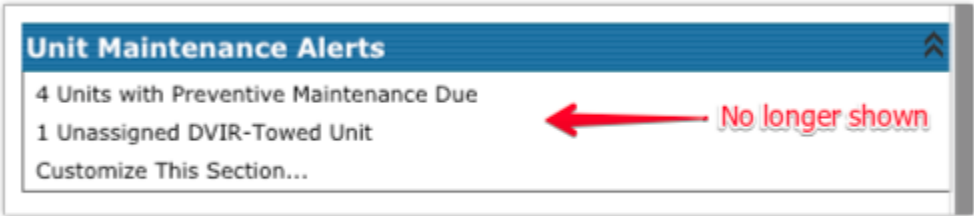
 If the DVIR is submitted via a mobile application (i.e. KellerMobile or DVIR Application), the Encompass user will NOT be able to enter the Reviewing Driver. Instead, once the DVIR

has been marked that the defects have been corrected, the inspection will be sent back to the driver via the application for them to certify the corrections themselves.

A success message will then be displayed.

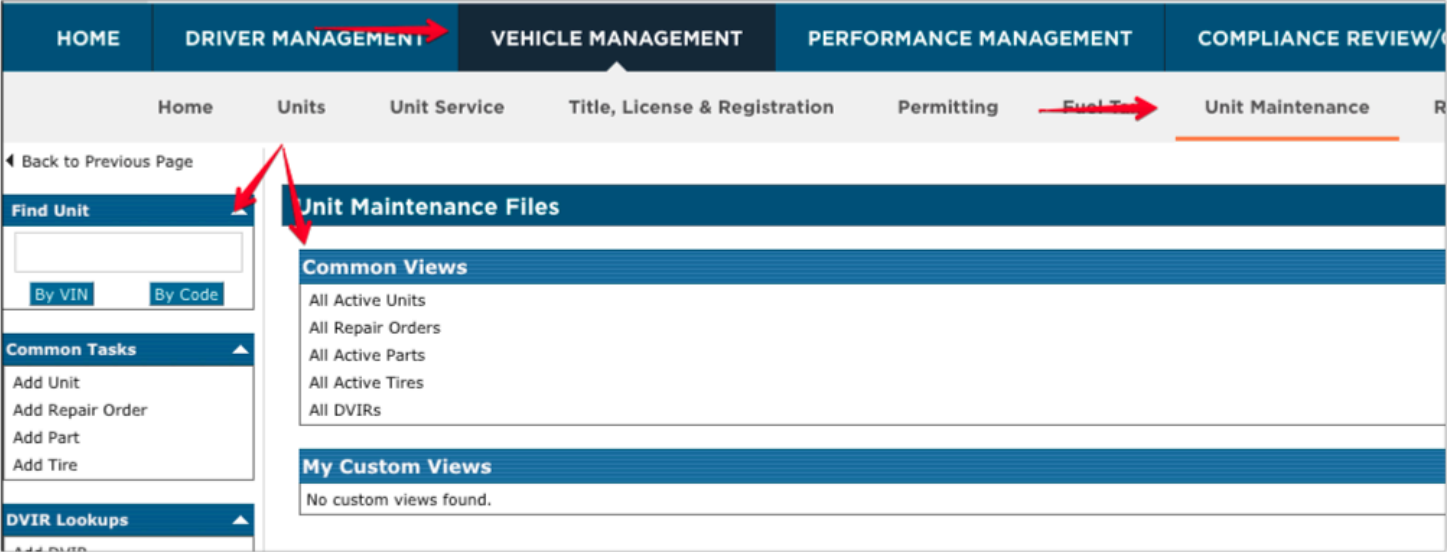


The alert count is then reduced by 1 (or completely removed if the resulting value is 0).



Deleting DVIRs

Go to **Vehicle Management > Unit Maintenance**. Look up the unit the DVIR is associated with by using the search box on the left, or by using a Common View.



Click on the Unit Code.

Unit Maintenance			
Add Unit			
Select View: All Active Units Go Customize... Print			
Unit Code ▲	Description	Company Level	Primary
001	Heavy Hauler	Guides Presentation	JN8AF5M
002	U002	Guides Presentation	
003	U003	Guides Presentation	
004	U004	Guides Presentation	
005	U005	Guides Presentation	
006	U006	Guides Presentation	
45678	Tractor	Guides Presentation	
Driver 1 Unit	Driver 1 Unit	Guides Presentation	
Driver2Unit	Driver 2 Unit	Guides Presentation	

Vehicle Inspections (DVIRs)

Scroll down(if needed) to the DVIR section. Click Del next to the DVIR that needs to be deleted.

Note: The date range of the DVIRs listed defaults to the last 30 days. If the DVIR needed is not shown, change the date range above the listing and click Go.

View Unit Maintenance - 002

Unit Information

Edit...

Code:002Company Level:Guides Presentation

Description:U002Unit Type:Truck

Make:(Not Specified)Model:

Current Odometer:156431Current Hours:

License Plate:Jurisdiction:

Unit Preventive Maintenance Schedule

Add New...

Description

Date Due

Increment Size

Hours

Miles

Preventive Maintenance Due

Entered

Between:3/25/2019

And:4/24/2019

Go

Repair Orders

Add New...

Add Attachment...

Order Number

Date Entered

Date Started

Date Completed

Description

Last Edited

2

04/23/2019

04/23/2019

04/24/2019

Oil Change

User, Demo

Edit Del

Between:3/25/2019

And:4/24/2019

Go

DVIRs

Add New...

Add Attachment...

Date

Time

Type

Driver Submitted

4/24/2019

2:00 PM

Post-Trip

Driver, CT

Edit Del

There will be a Confirmation Screen asking to confirm the deletion. Click Yes to delete the record. There will be a warning displayed if the DVIR is less than 3 months old.

Confirm Delete DVIR

DVIR Information
DVIR Date: 4/24/2019
DVIR Time: 2:00 PM
Unit Code: 002

Are you sure you want to delete this DVIR?

By regulation, this information should be retained for 3 months.

A success message will then be displayed indicating that the record has been deleted.

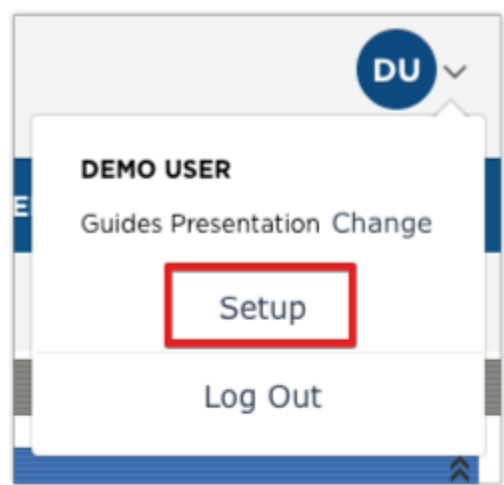
View Unit Maintenance - 002

DVIR successfully deleted.

Preventive Maintenance Scheduling

Setting PMs for Unit Types

While in the Vehicle Management tab, go to Setup.

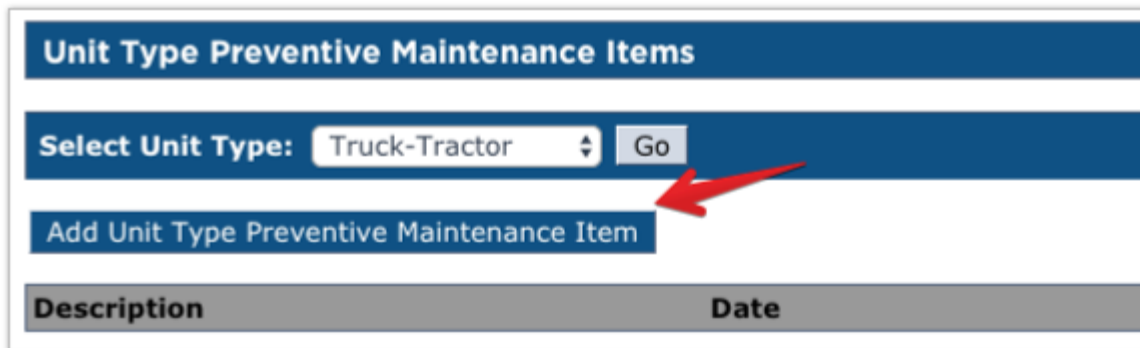


Scroll down to the Maintain Unit Maintenance Info box and click on Unit Type Preventive Maintenance.



Preventive Maintenance Scheduling

Select the **Unit Type** from the drop-down list in which the preventive maintenance schedule is being setup for, then click **Add Unit Type Preventive Maintenance Item**.



Unit Type Preventive Maintenance Items

Select Unit Type:

Description	Date
-------------	------

Enter a **Description** (required).

Use **Date Due** for items that have a fixed date (rarely used).

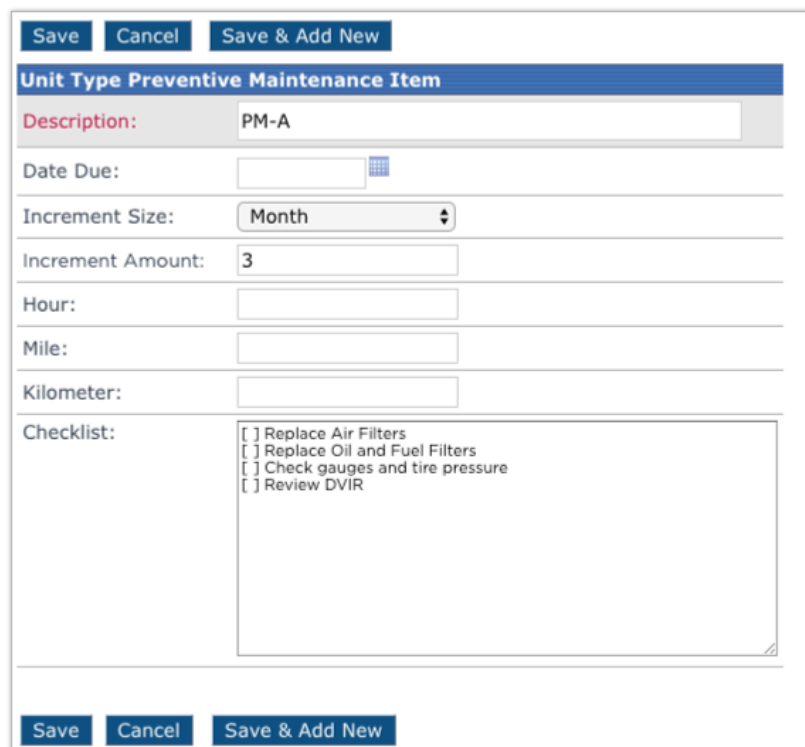
Use **Increment Size** and **Increment Amount** for items that recur by date (i.e., every 1 month, every 1 year, etc.)

Use **Hour** for items that should be triggered by time recorded on an hourmeter.

Use **Miles** or **Kilometers** for items triggered by distance (ex: oil change every 5,000 miles).

Type additional instructions in **Checklist**.

Click **Save** to finish.



Unit Type Preventive Maintenance Item

Description:

Date Due:

Increment Size:

Increment Amount:

Hour:

Mile:

Kilometer:

Checklist:

- ☐ Replace Air Filters
- ☐ Replace Oil and Fuel Filters
- ☐ Check gauges and tire pressure
- ☐ Review DVIR

Preventive Maintenance Scheduling

All units with that unit type selected will then have this preventive maintenance schedule applied to them and alerts will be generated when they are coming up due. The alert (not shown) will be seen in the **Unit Maintenance Alerts** box on the **Vehicle Management** home page. The alerts are:

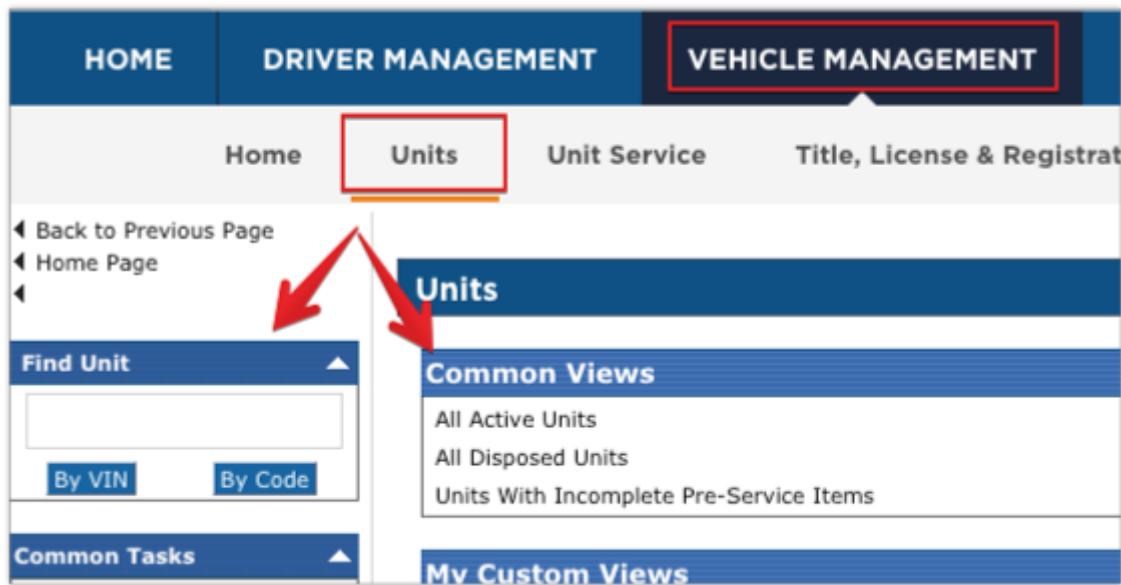
- Units with Preventive Maintenance Due
- Units with PM's Coming Due in 30 Days
- Units with PM's Coming Due in 60 Days

The screenshot shows a web interface titled "Demo User's Home Page" with a "Customize..." link. The date "Monday, Apr 22, 2019" is displayed in the top right. The page contains several alert boxes:

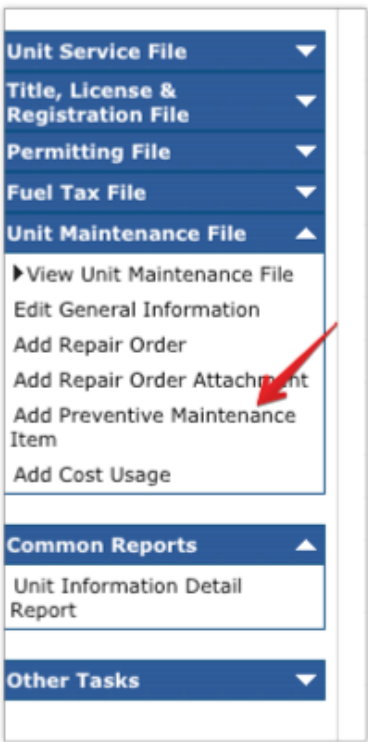
- Priority Alerts**: 19 Units Not Qualified, 1 Unit With Incomplete Permits, Customize This Section...
- Unit Alerts**: 1 Unassigned ELD, Customize This Section...
- Unit Maintenance Alerts** (highlighted with a red border): 1 Unassigned DVIR-Towed Unit, Customize This Section...
- Messages**: March 2019 New features now available! Click here for details
- Unit Service Alerts**: 19 Units Not Qualified, Customize This Section...
- Parts Inventory Alerts**: Customize This Section...

Setting PMs for Individual Units

Find the unit in the Units tab by either using the Find Unit search on the left, or click on All Active Units to select the unit from a list.



Click on the unit code to view the unit file. On the left-hand side, expand the area titled Unit Maintenance File, and click on Add Preventative Maintenance Item.



Preventive Maintenance Scheduling

Enter a **Description** (required).

Use **Date Due** for items that have a fixed date (rarely used).

Use **Increment Size** and **Increment Amount** for items that recur by date.

Use **Hour** for items that should be triggered by time recorded on an hourmeter.

Use **Miles** or **Kilometers** for items triggered by distance (ex: oil change every 5,000 miles)

Enter **Date Completed** the last time the maintenance item was completed.

Use **Last Hour Completed** to indicate what the hourmeter reading was the last time the maintenance was completed.

Use **Last Mile(or Kilometer) Completed** to indicate what the odometer reading was the last time the maintenance was completed.

Click **Save** to finish.

Add Unit Preventive Maintenance - 001

Shaded Fields are Required

Save

Cancel

Save & Add New

Unit Type Preventive Maintenance Item

Description

PM-A

Is N/A

☐

Date Due

Increment Size

Month

Increment Amount:

3

Hours

Miles

Date Completed

4/15/2019

Last Hour Completed

Last Mile Completed

Save

Cancel

Save & Add New

Repair Orders

Opening a Repair Order

Go to Vehicle Management > Unit Maintenance. Click on Add Repair Order on the left hand side under Common Tasks.

Find Unit

By VINBy Code

Common Tasks

Add Unit

Add Repair Order

Add Part

Add Tire

DVIR Lookups

Add DVIR

Purge DVIR

Maintain DVIR Category

Maintain DVIR Defect

Maintain DVIR Templates

DVIR Settings

Click on the unit number in which to add the repair order.

Unit Maintenance		
Add Unit		
<div>Select View: Add Repair Order for UnitGoCustomize...Print</div>		
Unit Code ▲	Description	Company Level
001	Heavy Hauler	Guides Presentation
002	U002	Guides Presentation
003	U003	Guides Presentation
004	U004	Guides Presentation

Repair Orders

The Repair Order Number can be changed, but it must be unique. By default, it will increment up by one from the last used number. Do NOT enter a Date Completed until all Repair Order Details are complete.
Click Save.

Add Repair Order - 002

Shaded Fields are Required

Save

Cancel

Save & Add New

General Information

Repair Order Number

2

Generate Number

Odometer Reading

Hours Reading

Date Started

Date Completed

Save

Cancel

Save & Add New

Repair Orders

Preventative Maintenance Due will show the due items if any exist. Repair Order Summary displays the current data for the repair order.

View Repair Order - 2

Repair Order information was successfully stored.

Unit Information

Edit...

Code:002Company Level:Guides Presentation

Description:U002Unit Type:Truck

Make:(Not Specified)Model:

Current Odometer:Current Hours:

License Plate:Jurisdiction:

Preventive Maintenance Due

Repair Order Summary

Date Entered:4/23/2019Total Cost:\$0.00

Number of Details:0Parts:\$0.00

Details Completed:0Labor:\$0.00

Miscellaneous:\$0.00

Repair Order Information

Edit...

Odometer Reading:

Hours Reading:

Date Started:4/23/2019

Date Completed:

Repair Order Details

Add New...

DescriptionPM TypeRepair ReasonCompleted

Click Add New... next to Repair Order Details.

Repair Order Details

Add New...

DescriptionPM TypeRepair ReasonCompleted

Repair Orders

Enter a Description or choose from the drop-down list.
If the task is related to a preventative maintenance item, choose the PM Type.
Repair Reason is optional.
Do NOT check Is Repair Done until all parts, labor, and tire details are complete.
Enter any Service/Special Instructions and Miscellaneous Cost information.
Click Save to finish.

Add Repair Order Detail - 2

Shaded Fields are Required

Save

Cancel

Save & Add New

Save and Complete Repair Order

General Information

Description

PM Type

Repair Reason

Is Repair Done?

☐

Service/Special Instructions

Miscellaneous Cost

Miscellaneous Cost Reason

Save

Cancel

Save & Add New

Save and Complete Repair Order

To add parts, mechanics, or tires, click on the related item in the Description column.

Repair Order Details		Add New...			
Description	PM Type	Repair Reason	Completed		
Oil Change		Routine	No	Edit	Del

Repair Orders

To add Mechanic information, click Add New... next to Repair Order Detail Mechanics.
To add Parts information, click Add New... next to Repair Order Detail Parts.
To add Tire Maintenance information, click Add New... next to Repair Order Detail Tire Actions.

Repair Order Detail Mechanics

Add New...

Code	Name	Hours	Cost/Hour	Labor Costs
------	------	-------	-----------	-------------

Repair Order Detail Parts

Add New...

Part Qty Number	Inventory Location	Cost/Unit Tax	Total Cost
-----------------	--------------------	---------------	------------

Repair Order Detail Tire Actions

Add New...

Tire Code	Action	Position	Tread Depth
-----------	--------	----------	-------------

Printing Repair Orders

To print a single repair order, go into the repair order by going to **Vehicle Management > Unit Maintenance**. Find the repair order by going into the appropriate unit from the search on the left or going into **All Active Units** under **Common Views**, or by going through the list by **All Repair Orders**. Click on the repair order number to view the repair order. Click on **Print Repair Order** in the **Repair Order** box on the left hand side of the page.

HOME

DRIVER MANAGEMENT

VEHICLE MANAGEMENT

PERFORMANCE MANAGEMENT

Home

Units

Unit Service

Title, License & Registration

Permitting

Fuel T

◀ Back to Previous Page

◀ Unit Maintenance Files

◀ Home Page

Repair Order

▶ Print Repair Order

▶ Change Repair Order - Unit

View Repair Order - 2

Unit Information

Edit...

Code:002

Company Level:Guides Presentation

Description:U002

Unit Type:Truck

Make:(Not Specified)

Model:

Current Odometer:

Current Hours:

License Plate:

Jurisdiction:

Preventive Maintenance Due

Repair Order Summary

Date Entered:4/23/2019

Total Cost:\$0.00

Number of Details:1

Parts:\$0.00

Details Completed:0

Labor:\$0.00

Miscellaneous:\$0.00

Check boxes for the Print Options needed and click Run Report.

Print Options:


☒ Print PM Checklist

☒ Include Service/Special Instructions

Run Report

Save Report Settings

Cancel

 The report will open in another window. Be sure to have any pop-up blockers disabled in the browser.

Report Viewer: Repair Orders Report

Email to:

SendAddress BookExport To RTFExport To ExcelClose

Guides Presentation

111 ABC St.

Appleton, WI 54914

Phone: 9204242243

Repair Order #: 2

Page: 1

Date:

Unit Code: 002

Current Odometer: 0

Description: U002

Make: (Not Specified)

Model:

Total Cost: \$0.00

Parts: \$0.00

Labor: \$0.00

Miscellaneous: \$0.00

Work Completed and Labor

No.	Hrs	Repair Description/ Mechanic	Reason	Cost/Hr	Cost
1		Oil Change	Routine - (11)		

Completing/Closing a Repair Order

Before the entire repair order can be closed, or marked as completed, each item in the **Repair Order Detail** need to be completed. When viewing the repair order, click on the description of the repair order detail.

View Repair Order - 2

Unit Information [Edit...](#)

Code:	002	Company Level:	Guides Presentation
Description:	U002	Unit Type:	Truck
Make:	(Not Specified)	Model:	
Current Odometer:		Current Hours:	
License Plate:		Jurisdiction:	

Preventive Maintenance Due

Repair Order Summary

Date Entered:	4/23/2019	Total Cost:	\$0.00
Number of Details:	1	Parts:	\$0.00
Details Completed:	0	Labor:	\$0.00
		Miscellaneous:	\$0.00

Repair Order Information [Edit...](#)

Odometer Reading:	
Hours Reading:	
Date Started:	4/23/2019
Date Completed:	

Repair Order Details [Add New...](#)

Description	PM Type	Repair Reason	Completed	Edit	Del
Oil Change		Routine	No		

Click Edit next to Repair Order Detail.

View Repair Order - 2 - Detail: Oil Change

Repair Order Detail

Edit...

⌆

Description:

Oil Change

PM Type:

Repair Description:

Routine

Is Repair Done?

No

Service/Special Instructions:

Miscellaneous Cost:

Miscellaneous Cost Reason:

Repair Order Detail Summary

⌆

Total Cost:

\$0.00

Parts Cost:

\$0.00

Labor Cost:

\$0.00

Miscellaneous Cost:

\$0.00

Enter any missing details for the repair order detail, and check the box for Is Repair Done? to close this repair detail. If this is the only detail, or the last detail being entered, click **Save and Complete Repair Order**. Otherwise, click **Save**.

Edit Repair Order - 2 - Detail: Oil Change

Shaded Fields are Required

Save

Cancel

Save and Complete Repair Order

General Information

Description

Oil Change

PM Type

Repair Reason

Routine

Is Repair Done?

☒

Service/Special Instructions

Miscellaneous Cost

Miscellaneous Cost Reason

Save

Cancel

Save and Complete Repair Order

Repair Orders

Repeat the above steps for any remaining Repair Order Detail Items. Once all items show as **Complete**, the Repair Order can be completed.

View Repair Order - 2

Unit Information

Edit...

Code: 002 Company Level: Guides Presentation

Description: U002 Unit Type: Truck

Make: (Not Specified) Model:

Current Odometer: Current Hours:

License Plate: Jurisdiction:

Preventive Maintenance Due

Repair Order Summary

Date Entered: 4/23/2019 Total Cost: \$0.00

Number of Details: 1 Parts: \$0.00

Details Completed: 1 Labor: \$0.00

Miscellaneous: \$0.00

Repair Order Information

Edit...

Odometer Reading:

Hours Reading:

Date Started: 4/23/2019

Date Completed:

Repair Order Details

Add New...

Description	PM Type	Repair Reason	Completed	Edit	Del
Oil Change		Routine	Yes		

Click Edit next to Repair Order Information.

View Repair Order - 2

Unit Information

Edit...

Code:002

Company Level:Guides Presentation

Description:U002

Unit Type:Truck

Make:(Not Specified)

Model:

Current Odometer:

Current Hours:

License Plate:

Jurisdiction:

Preventive Maintenance Due

Repair Order Summary

Date Entered:4/23/2019

Total Cost:\$0.00

Number of Details:1

Parts:\$0.00

Details Completed:1

Labor:\$0.00

Miscellaneous:\$0.00

Repair Order Information

Edit...

Odometer Reading:

Hours Reading:

Date Started:4/23/2019

Date Completed:

Repair Order Details

Add New...

Description	PM Type	Repair Reason	Completed		
Oil Change		Routine	Yes	Edit	Del

Enter a Date Completed, and any other needed details, and click Save to close the Repair Order.

Edit Repair Order - 2

Shaded Fields are Required

Save

Cancel

General Information

Repair Order Number

2

Odometer Reading

235123

Hours Reading

Date Started

4/23/2019

Date Completed

4/24/2019

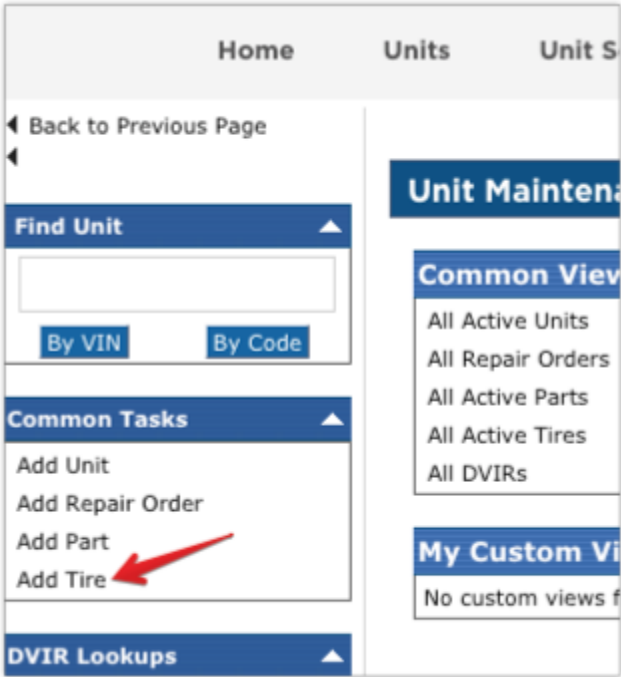
Save

Cancel

Tire Information

Tire Information

To add Tire Information, go to Vehicle Maintenance > Unit Maintenance. On the left side, under Common Tasks, click Add Tire.



Tire Information

Enter a unique Tire Code (30 characters or less). The remaining fields are optional, but it is recommended to enter the Serial Number. Click Save.

Add Tire

Shaded Fields are Required

Save

Cancel

Save & Add New

General Information

Tire Code

Description

Manufacturer

Tire Size

Serial Number

Warranty Date

Is Disposed?

☐

Save

Cancel

Save & Add New

To view the tire information, from the Unit Maintenance tab, click All Active Tires.

Unit Maintenance Files

Common Views

All Active Units

All Repair Orders

All Active Parts

All Active Tires

All DVIRs

My Custom Views

No custom views found.

Click on the Tire Code of the desired tire.

Unit Maintenance

Add Tire

Select View: Active TiresGoCustomize...Print

Tire Code	Description	Serial Number	Manufacturer	Tire Size
123456	Radial Tires	123456789		LT245/75R16

1 - 1

To edit the information about the tire, click **Edit...** next to **Tire Summary**.
Tire History allows to add action information for the tire.

View Tire - 123456

Tire SummaryEdit...

Tire Code:

123456

Description:

Radial Tires

Manufacturer:

Tire Size:

LT245/75R16

Serial Number:

123456789

Warranty Date:

Is Disposed?:

No

Tire HistoryAdd New...

Date	Action	Unit	Tread Depth	Position	Comments
------	--------	------	-------------	----------	----------

If tire actions were recorded on a repair order, those actions can be changed by editing the repair order, or, by clicking the edit link next to the action. Once information is entered/edited for the action, click **Save**.

Add Tire History - 123456

Shaded Fields are Required

Save

Cancel

Save & Add New

General Information

Action Date

4/23/2019

Action

Mount a Tire

Unit

Tread Depth

Position

(Not Specified)

Comments

Save

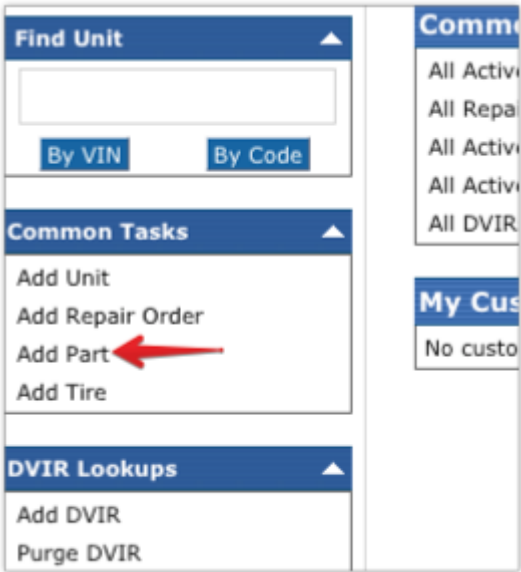
Cancel

Save & Add New

Parts Inventory

Adding a Part

From the Unit Maintenance tab, click Add Part under Common Tasks on the left side of the screen.



Part Number is required and must be unique. It can be up to 20 characters long.
System Code can be selected to reflect the VMRS (Vehicle Management Reporting Standards).
Billable Tax Rate cannot be edited on this page. This is entered by the company's Encompass Administrator via **Vehicle Management > Setup > Unit Maintenance Settings**.
Re-Order Point is not the inventory value that triggers an alert to order more of that part.
Stock Quantity is the quantify that is ordered each time the order is placed. It is not the quantity on hand.

 Parts are used on Repair Orders. The Billable Cost helps determine the cost of a repair order.

Add Part

Shaded Fields are Required

Save

Cancel

Save & Add New

Save & Add Inventory Transaction

General Information

Part Number

Description

System Code

Is Inactive?

☐

Billable Cost

Billable Tax Rate

0.00%

Billable Tax

Re-Order Point

(Must be >0 for inventory alert notification)

Re-Order Part Number

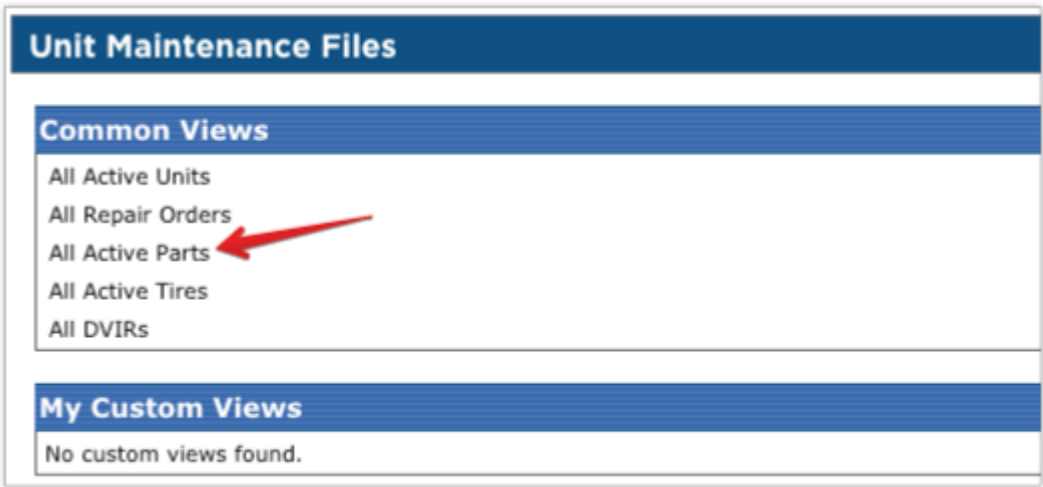
Stock Quantity

Notes

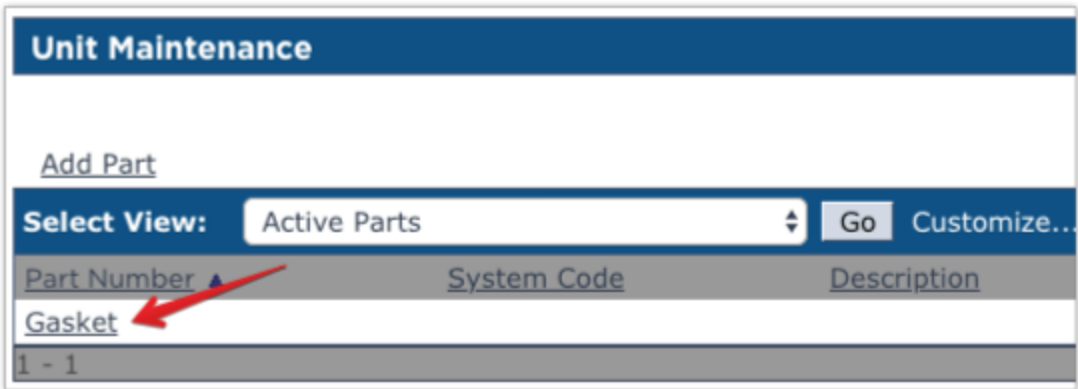
Inventory Transactions

Transactions are used to add inventory after (re)ordering, adjusting quantities on hand, or to track part transfers between locations.

Go to Vehicle Management > Unit Maintenance > All Active Parts.



Click on the part number that a transaction needs to be completed for.



Choose an Inventory Location before modifying location transactions. Once a location is specified, click **Add New...** to create a new inventory transaction for that location.

View Part - Gasket

Part Information

Edit...

Part Number:

Gasket

Is Inactive?:

Description:

Quantity On Hand:

System Code:

Re-Order Point:

Billable Cost:

\$0.00

Re-Order Part Number:

Billable Tax Rate:

0.00%

Stock Quantity:

Billable Tax:

\$0.00

Notes:

Inventory Location

Main

Between: 3/24/2019

And: 4/23/2019

Inventory Location Information

Edit...

Bin:

Quantity On Hand at this Location:

Inventory Location Transactions

Add New...

Date

Qty

Action

Vendor

Re-order #

Cost/Unit

Tax

Total Cost

Comments

Enter the Transactions Date, Quantity, and Action. The remaining details are optional.
Note: The Vendor and Purchase Tax Rate (shown next to the Tax), is set up by going to **Vehicle Management > Setup > Unit Maintenance Setup**.

Add Inventory Transaction - Gasket - Main

Shaded Fields are Required

SaveCancelSave & Add New

General Information

Transaction Date

4/23/2019

Quantity

5

Action

Adjustment Out

Vendor

Re-order Number

5

Cost/Unit

0.00

Tax

0.00

Purchase Tax Rate 0.00%

Total

0.00

Comments

SaveCancelSave & Add New

Unit Cost Usage

Adding Unit Cost Usage

Unit Cost Usage is used to track the operation cost of a vehicle, including fuel and oil.

From the **Unit Maintenance** tab, click on the **Unit Code** from either searching it on the left hand side in the search bar, or from a list such as **All Active Units** under **Common Views**. When viewing the **Unit Maintenance File** for the unit, click **Add Cost Usage** on the left hand side under **Other Unit Maintenance Tasks** (Note: if there is nothing listed under the header, click on the white triangle in the blue bar to the right of header of the section to expand the menu).

[Back to Previous Page](#)
[Unit Maintenance Files](#)
[Home Page](#)

Find Unit

Unit Maintenance File
[View Unit Maintenance File](#)
[Edit General Information](#)
[Add Preventive Maintenance Item](#)
[Add Repair Order](#)
[Add Repair Order Attachment](#)
[Add DVIR](#)

Other Unit Maintenance Tasks
[View Unit Cost Usage](#)
[Add Cost Usage](#)

Related Areas
[Company Level List](#)
[Purge Repair Orders](#)
[Purge Parts](#)
[Purge Cost Usage](#)
[Purge Tires](#)

Unit File
[Unit Service File](#)

View Unit Maintenance - 002

Unit Information Edit...

Code: 002 Company Level: Guides Presentation
Description: U002 Unit Type: Truck
Make: (Not Specified) Model:
Current Odometer: Current Hours:
License Plate: Jurisdiction:

Unit Preventive Maintenance Schedule Add New...

Description	Date Due	Increment Size	Hours	Miles
Preventive Maintenance Due				

Entered Between: 3/25/2019 And: 4/24/2019 Go

Repair Orders Add New... Add Attachment...

Order Number	Date Entered	Date Started	Date Completed	Description	Last Edited
2	04/23/2019	04/23/2019	04/24/2019	Oil Change	User, Demo Edit Del

Unit Cost Usage

Enter the Date (required). Enter in the remaining fields as needed. Click Save when finished.

Add Unit Cost Usage - 002

Shaded Fields are Required

Save

Cancel

Save & Add New

Unit Cost Usage Information

Date

4/24/2019

Odometer

Hours

Fuel Units

Gallons

Fuel Quantity

0

Fuel Cost

0

Default price per Gallons = \$0.00

Oil Units

Quarts

Oil Quantity

0

Oil Cost

0

Default price per Quarts = \$0.00

Total Cost

0.00

Save

Cancel

Save & Add New