



CheckedSafe User Guide for Back Office Management Information Functions using screen shots and descriptions

(this is not exhaustive but will give clear guidance on use)

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CheckedSafe User Index:

Each section in the index is hyperlinked to the pages for that part of the guide just click the one you want to view on the index page and it will take you to that page and section for guidance, every thing is explained in each section, if you have any problems please contact support@checkedsafe.com

Dashboard Section – (Point to each section below to link directly to that page)

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6. [Notifications](#) – any documents you have uploaded to your fleet (vehicle folder) or staff (Staff Folder) – you can see all listed here in date order
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The CheckedSafe back office area is where you can:

- Manage the daily defects,/checks and manage your fleet
- Manage you asset including reminders, scheduling and storage of all documents
- Set up reminders and email groups for information and actions
- Allows your fleet or assets business become completely paperless
- *NOTE: all the blue fonts in the back office are all hyperlinks back to a check/folder/asset etc*

1. Checkedsafe Back Office Dashboard Login

Point your web browser to the URL <http://app.checkedsafe.com/> and you will be presented with the login screen. Below is a screenshot of the login page; login with your username and password and if successful you will be taken to the dashboard. If you have trouble logging in or you are refused entry to the system, then raise a support call support@checkedsafe.com or 01282 908429

Note the data once submitted cannot be edited or deleted if a mistake is made you simply do that task again with the correct information this is a positive approach as it indicates a fully compliant process

2. Dashboard View

Dashboard Screen provides live daily information clicking any segment will take you to reports – this will be your daily view, it can be viewed on Desktop/Ipad/Tablet/Phone – anything with an internet/web portal link

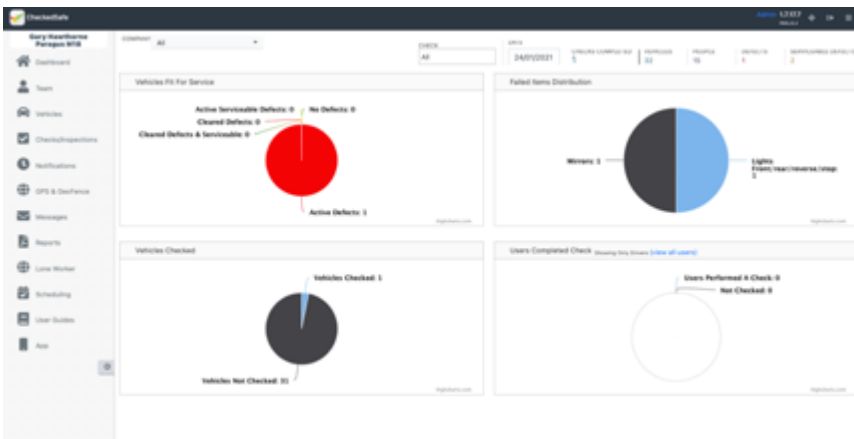
The dashboard provides an immediate overview of your live daily fleet. It indicates:

- Date
- Fleet size
- Filter by depot using the drop down menu labelled “Company”
- Checks completed
- Filter by Check name using the drop down menu labelled “Check”

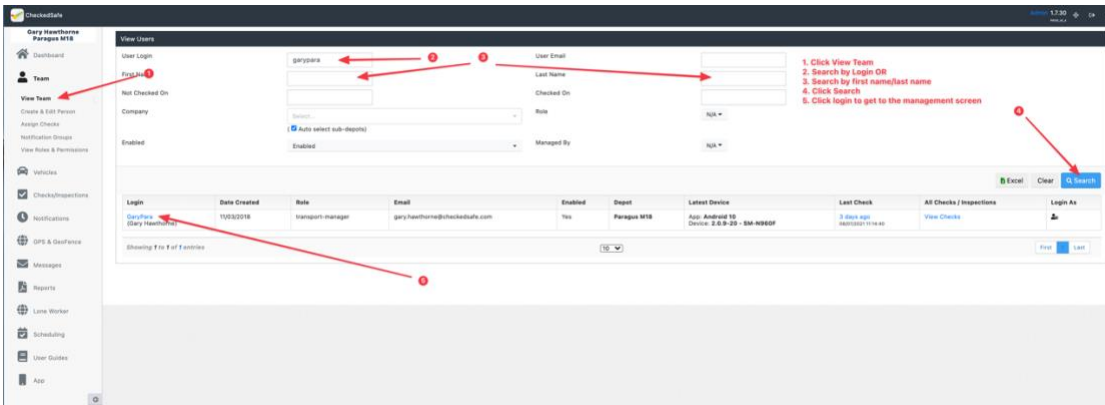
The Pie charts show clearly a snapshot of today and includes:

- Vehicles fit for service
- Failed by type
- Vehicles checked as part of fleet total
- Vehicles passed fit and vehicles still on fail (defect)

By clicking on any of the segments it will take you to the list of checks by that type, such as direct to failed checks today



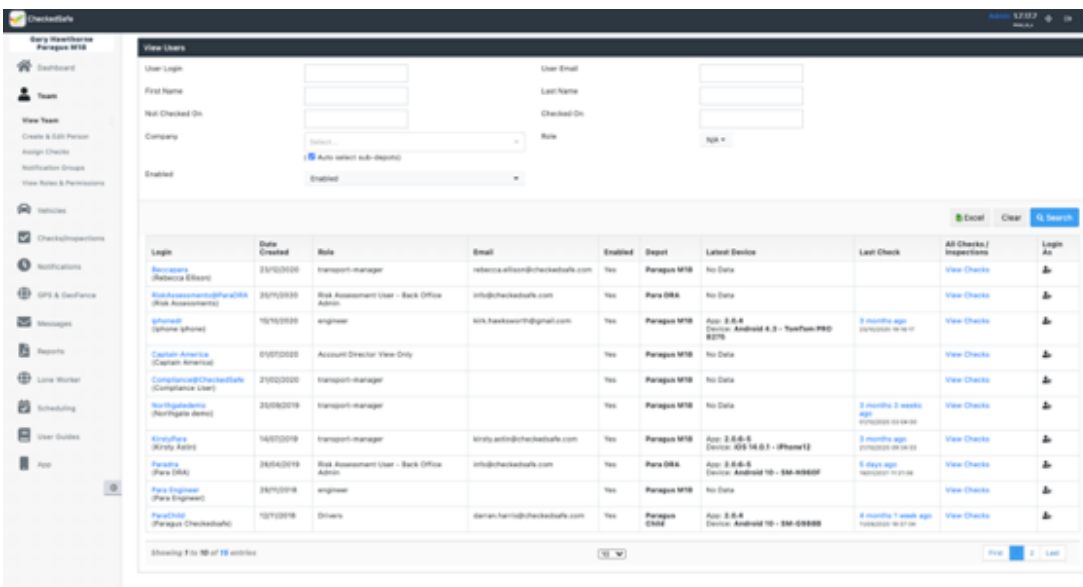
3. View Team



By Clicking View team you then get a menu page to search by login, name, email etc. Type in any of these sections and press search, the team member will then appear, and you can click the hyperlinks to view the profile or view that persons last check or all checks.

Tip: the view is always default to active users to view any specific roles you can use the dropdown filter box for Role, and you can also use the dropdown labelled enabled to view any disabled users

You can view all your team, to do this don't specify any search criteria just click view team and click search



In this section, once you have the whole team on view you can click any of the “blue” hyperlinks which will take you to whichever section you wish to have a look at, this page also provides information on:

- **Login** – users login and name
- **Date created**
- **Role** – what level of responsibility they have in CheckedSafe system
- **Email** details
- **Enabled** (current status)
- **Depot** - which Depot the user is assigned to
- **Latest Device** - The latest information on what device has been used (if any) to do a check
- **Last Check** - Information on last check done
- **All Checks/Inspections** - Link to view all that persons check

Viewing the individual team member details by clicking on their actual hyperlink on the view team page

1 All passwords are now hidden

2 You can create/update passwords and inform the user what it is

3 If you tick Auto Logout the user will be automatically logged out of the App once they submit a check. so be aware of that in line with the hidden passwords

4 Once you press submit you have committed the changes and the password created or edited will once again be hidden

User profile page - here you can see all details and can tick options for that user, you may also disable the user, so they no longer have access. There are other options within the user profile area that will assist you in managing the staff member, which are listed below:

a. Managing Team Options

- **Send notification** – you send the user a notification from here direct to their App
- **Generate a report for user** on all checks they have undertaken
- **Email Summaries** - If they are back-office staff, they can have daily or weekly summary emails set up which provide a snapshot of the daily /weekly output (Checks done, who’s not checked, too fast, too slow, reminders for staff/assets to be serviced or certain renewals up and coming and any outstanding defects that require action)
- **Loneworkers** - You can also in the section manage (if you have Loneworkers) your LW profile emails
- **User Documents** - Adding documents to this profile and pushing out to the handset is a really good feature you can push out any document to the App such as Handbook, Driver Licensing etc.
- **GPS and Geo Fence** – If you have the option of GPS and Geo fencing within the app (this is our tracker, and you can geo fence locations and receive notifications of entry/exit with/without checks/defects

The screen shots on the next page show you how/where (as per the above options)

Send Notification

Notification

[Send](#)

Generate Report for User

Report From

Report To (blank for today)

Generate Report For All Users

Check to Report on

[Excel](#) [PDF](#)

Email Summaries

Daily

Receive Daily Email

Skip Weekend?

Receive Daily Email On Previous Day Current Day

Time to receive email

Weekly

Receive Weekly Email

Receive Weekly Email On Friday (for following Mon-Sun) Monday (for current Mon-Sun)

Depots

Depots

[Submit](#)

Lone Worker Stationary Parameters

No User specific LoneWorker Stationary Parameters defined - [Override defaults](#)

Lone Worker Alerts

Receive Alerts When a LoneWorker...

Starts	Email <input type="checkbox"/>	Text <input type="checkbox"/>
Ends	Email <input type="checkbox"/>	Text <input type="checkbox"/>
Is Overdue	Email <input checked="" type="checkbox"/>	Text <input type="checkbox"/>
SOS	Email <input checked="" type="checkbox"/>	Text <input type="checkbox"/>
Stationary	Email <input checked="" type="checkbox"/>	Text <input type="checkbox"/>

Choose Depots

[Submit](#)

GeoLocation Configuration

No User specific GeoLocation Parameters defined - [Override defaults](#)

User Documents

Upload User Document

Document Type

Document Notes

Start Date (if applicable)

Expiration Date (if applicable)

Upload User Document (max 250 MB) [Choose file](#) No file chosen

[Upload](#)

User Documents

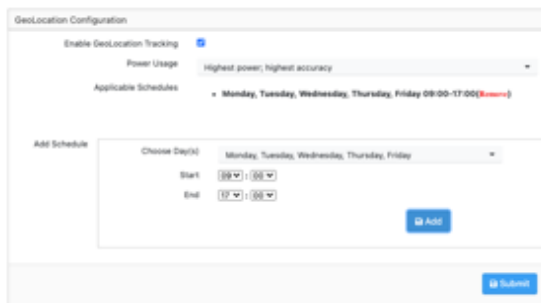
Document Type	Filename	Notes	Start Date	Expiration Date	Uploaded On	Notification	Actions
Dvr License Check Gary	20170120_131321.jpg	License Check Gary	01/05/2018		03/05/2018 09:05:09	Active: Next: 29/01/2021	Download Cancel Notification Delete Assign To App

GPS and Geo Fencing – If you have opted to use our versatile tracking option this is where you can configure your users/Geo fences and track your vehicles/staff. This is a great product to help you track and manage your team (it is an additional chargeable product).

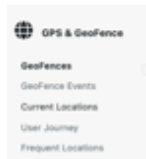
Once you have set up your user parameters – this is very straight forward – in the user profile click the “Override Defaults”.



Enter the days and times you wish to Geo tag your staff click enable and ADD this creates the Geo tracker to operate as long as they are logged in during those times



Once created you can now use the GPS and Geo Fence menus, left hand menu GPS & Geo Fence



View created Geo fences or create your own this allows you to control the areas and entry/exit reports for Defects and/or Checks completed/not completed. To create new Geo Fence click Create new, draw your Geo Fence, name it and set your parameters.



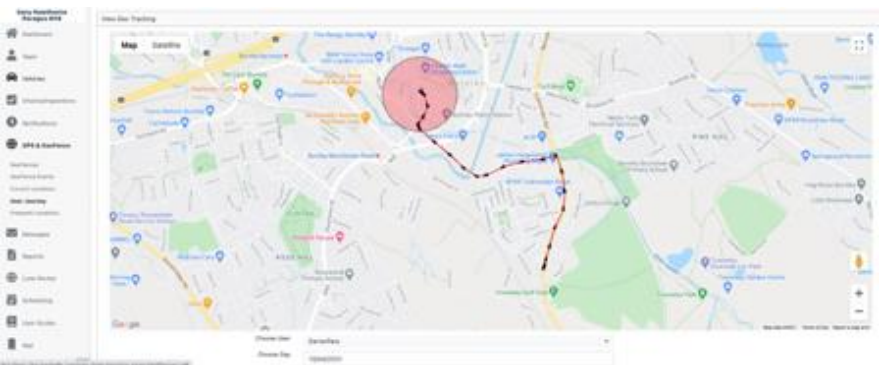
There is a full history log of all Geo Fence events – these are records of all triggered events recorded against all your Geo Fences set up you can view each one and review each Geo fence if required

Event Time	User	Event Type	Staffing Name	Staffance	Status
02/02/2023 17:00	Paragus W10	checked Safezone (Offroad) without performing a check	Offroad	Checked	View
02/02/2023 17:00	Paragus W10	checked Safezone (Offroad) without performing a check	Offroad	Checked	View
02/02/2023 17:00	Paragus W10	checked Safezone (Offroad) without performing a check	Offroad	Checked	View
02/02/2023 17:00	Paragus W10	checked Safezone (Offroad) without performing a check	Offroad	Checked	View
02/02/2023 17:00	Paragus W10	checked Safezone (Offroad) without performing a check	Offroad	Checked	View
02/02/2023 17:00	Paragus W10	checked Safezone (Offroad) without performing a check	Offroad	Checked	View
02/02/2023 17:00	Paragus W10	checked Safezone (Offroad) without performing a check	Offroad	Checked	View
02/02/2023 17:00	Paragus W10	checked Safezone (Offroad) without performing a check	Offroad	Checked	View
02/02/2023 17:00	Paragus W10	checked Safezone (Offroad) without performing a check	Offroad	Checked	View
02/02/2023 17:00	Paragus W10	checked Safezone (Offroad) without performing a check	Offroad	Checked	View

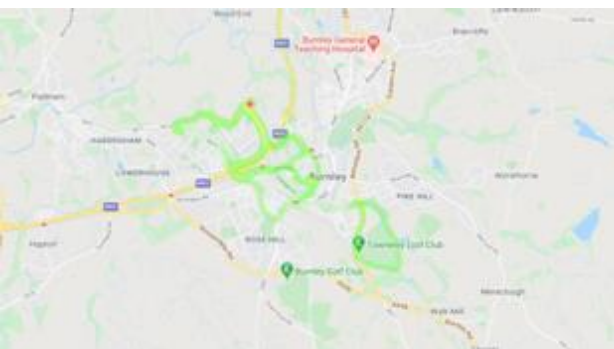
You can view the current location of your users (it will be the last recorded point) zoom in/out and click on the user will allow you to dive in deeper to the data.



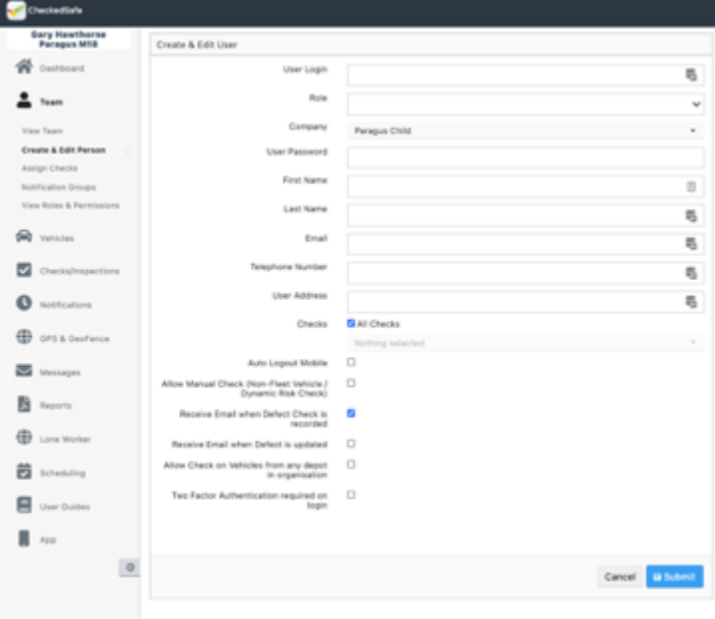
You can also look at the user’s journey – the system stores ALL previous journeys so you can search by user and by date, if you hover over the journey (black arrows) you will be able to ascertain the speed.



You can also see your users’ frequent journeys over a period (shown below as a heat map (green/yellow/Orange etc))



b. Create & Edit User - Adding a New User



- The user login must be unique across the system (see note below)
- The role must be selected from the dropdown
- The company will default to the one your logged in as if you have a hierarchy you can pick where the new user is to be allocated
- Password should be set.
- The User Enabled box should be ticked
- The other details should be entered as standard

TIP: DO NOT overwrite the user if you want to add a new user as all historical data will then tag to the new user, if you want to add a new user, you must click again Create and edit User and you will see the screen as below

If you get a message "USER ALREADY IN THE SYSTEM" but you know you don't have that person, it will be in the Global Checkedsafe system – think Gmail!

If you're setting up a user who is a 3rdparty and you're using the Notification group to allow them to manage defects, see below: (Notification Groups) leave the email section blank in their profile – otherwise they will receive all emails and you can also edit their role and permissions which can be found further on in this section

c. Assigning Check to users

In this section you can tailor what users can see, this cuts down the margin for error. If you have lots of templates and not all users need them then you can assign templates to the user and this will cut down what they can see and use via the app

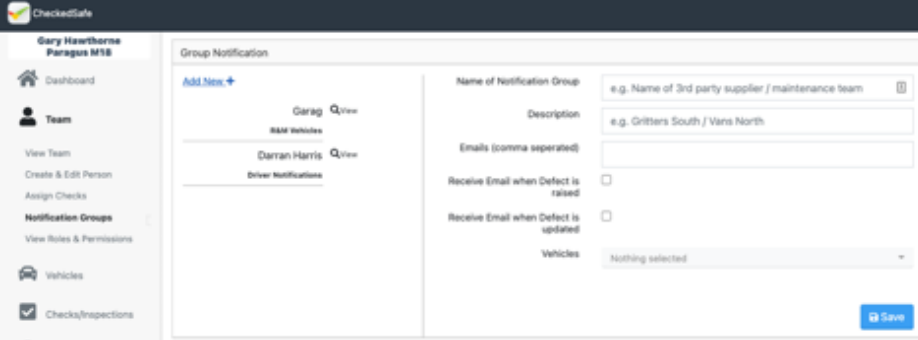


Check Type	Assign
Auto Logout Mobile	<input type="checkbox"/>
Allow Manual Check (Non-Fleet Vehicle / Dynamic Risk Check)	<input type="checkbox"/>
Receive Email when Defect Check is recorded	<input checked="" type="checkbox"/>
Receive Email when Defect is updated	<input type="checkbox"/>
Allow Check on Vehicles from any depot in organisation	<input type="checkbox"/>
Two Factor Authentication required on login	<input type="checkbox"/>

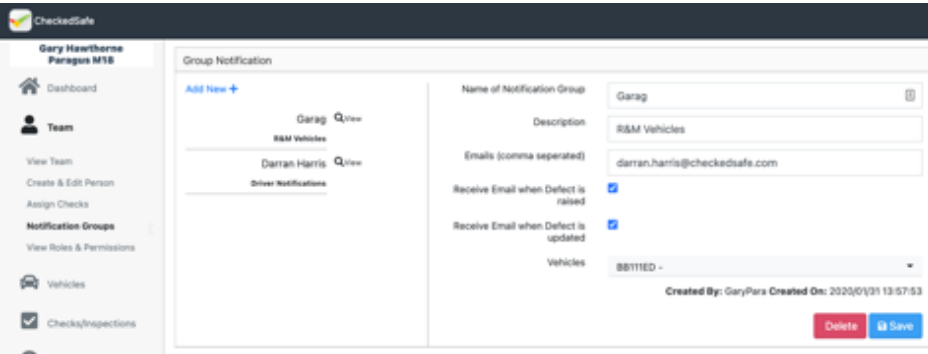
d. Group Notifications

If you use 3rd Party maintenance providers or you need others to see certain vehicle defects, you can do this by creating Notification groups. You can also add those users as a user and define their Role and Permissions which we will cover next, this is so they can log into the system and action any tasks.

Setup page for Notification Group



Example Group Notification Setup



e. Roles and Permissions

In this section you can create your own Roles and name them whatever you wish and also allocate permission levels.

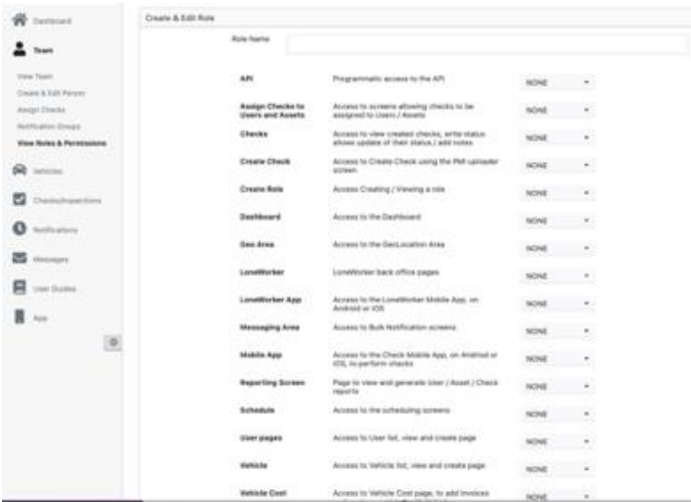
The core set of levels pre-set are:

- **Driver** – App only
- **Engineer** – App and back office for Defects only
- **Transport Manager** – full access to all back-office system and the App



Role Name	Access Area - Read/Write	Assigned Users	Edit Role
Driver	<ul style="list-style-type: none"> WRITE - Mobile App READ - Dashboard READ - Login/Logout READ - Reporting Status READ - Reporting Status READ - App READ - User Login READ - Create Check READ - Vehicle Check READ - Vehicle READ - Vehicle List READ - Reporting Status READ - Create Role WRITE - Login/Logout App WRITE - Login/Logout READ - View and Download Photos 	ChristopherM1, Dennis Lee	Edit Role Delete Role
Engineer	<ul style="list-style-type: none"> WRITE - Mobile App READ - Dashboard READ - Assign Checks to Users and Holes READ - Reporting Status READ - App READ - User Login READ - Create Check READ - Vehicle Check READ - Vehicle READ - Vehicle List READ - Reporting Status READ - Create Role WRITE - Login/Logout App READ - Login/Logout READ - View and Download Photos 	New Engineer, James	Edit Role Delete Role

Creating your own is very simple, click Create New, enter job title, allocate permissions and submit, then once submitted you can then assign users to that profile

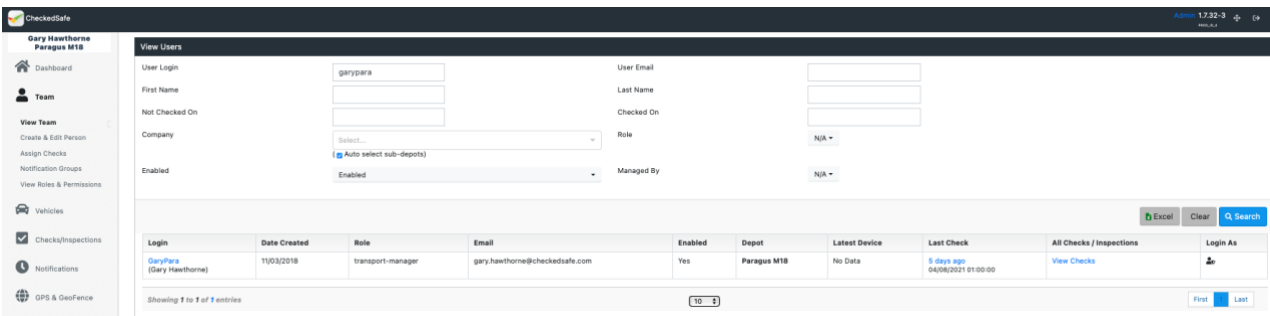


f. Adding Documents/photos/videos to user Roles

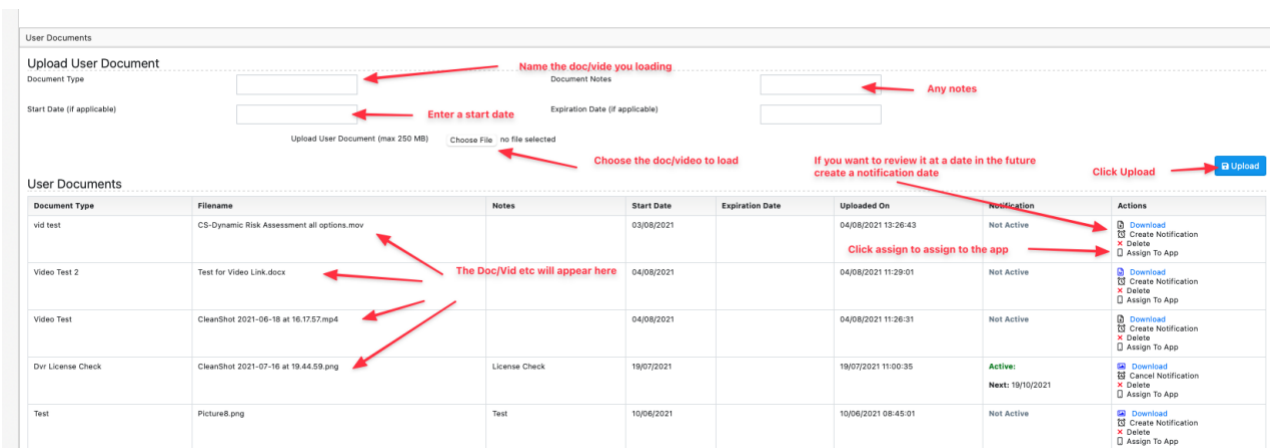
You can add documents to individual users and optionally push out to the app so the user can see them in the “documents tab” on the App, you can also track the amount of times the user has looked at the documents

Two options of how to do this:

Individually by user: find your user you wish to upload the document to



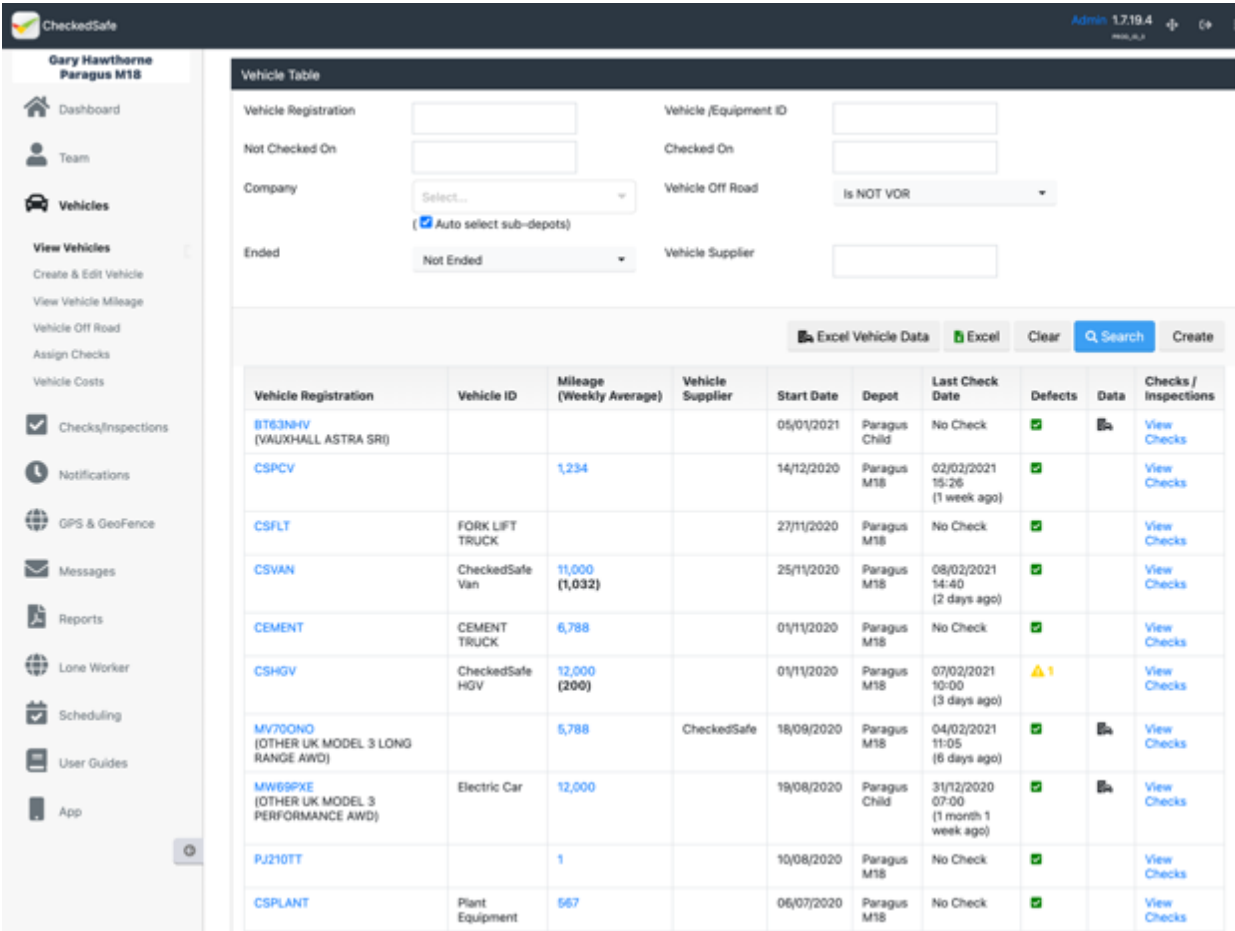
Click their login to get access to their profile, scroll down to Document uploader and follow screen shot below



Once assigned to the app the user has full access to whatever you have loaded. To check if they have opened it click the “assign to App” in the user profile and it will tell you how many times it has been opened. You can upload Word, Excel, Png, Jpeg, PDF and Mp4 videos.

If you wish to load the same doc/vid to lots of users create a unique profile for example and load all the core documents to that profile and send out to all from that profile – this is an easy way to manage the process.

4. View Vehicles

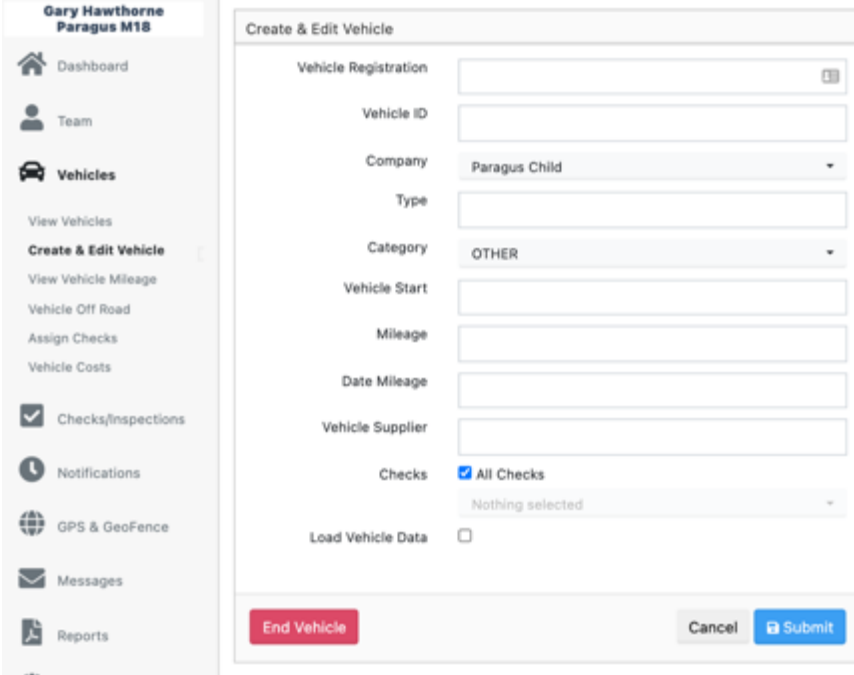


Vehicle Registration	Vehicle ID	Mileage (Weekly Average)	Vehicle Supplier	Start Date	Depot	Last Check Date	Defects	Data	Checks / Inspections
BT63NHY (VAUXHALL ASTRA SRI)				05/01/2021	Paragus Child	No Check	✓	📄	View Checks
CSPCV		1,234		14/12/2020	Paragus M18	02/02/2021 15:26 (1 week ago)	✓		View Checks
CSFLT	FORK LIFT TRUCK			27/11/2020	Paragus M18	No Check	✓		View Checks
CSVAN	CheckedSafe Van	11,000 (1,032)		25/11/2020	Paragus M18	08/02/2021 14:40 (2 days ago)	✓		View Checks
CEMENT	CEMENT TRUCK	6,788		01/11/2020	Paragus M18	No Check	✓		View Checks
CSHGV	CheckedSafe HGV	12,000 (200)		01/11/2020	Paragus M18	07/02/2021 10:00 (3 days ago)	⚠️ 1		View Checks
MV700NO (OTHER UK MODEL 3 LONG RANGE AWD)		6,788	CheckedSafe	18/09/2020	Paragus M18	04/02/2021 11:05 (6 days ago)	✓	📄	View Checks
MW69PXE (OTHER UK MODEL 3 PERFORMANCE AWD)	Electric Car	12,000		19/08/2020	Paragus Child	31/12/2020 07:00 (1 month 1 week ago)	✓	📄	View Checks
PJ210TT		1		10/08/2020	Paragus M18	No Check	✓		View Checks
CSPLANT	Plant Equipment	667		06/07/2020	Paragus M18	No Check	✓		View Checks

In this section clicking view checks allows you to:

- See the full list of your active fleet (you can filter at the top to view Ended Vehicle/Vehicle Off Road Vehicle or All Vehicles in both sections) – the default setting is to show active only
- You can filter out by Registration, by depot, by supplier and by dates checked
- The main vehicle list you can:
 - **Vehicle Registration** - Hyperlink to vehicle folder by clicking the vehicle registration/ID
 - **Mileage (weekly average)** See all last mileage/hour's data and hyperlink back to that section in the vehicle folder
 - **Vehicle Supplier** – handy for filtering and report on suppliers
 - **Start Date** - What date did the vehicle start
 - **Depot** - Which depot – if you have multi-sites
 - **Last check Date**
 - **Defect status** – Green all clear, Yellow – Serviceable, Red – Defect
 - **Data** If you have opted for the DVLA data, you can click the black symbol and that will bring up the V5 data
 - **Checks/Inspections** - Link direct to all the checks for that vehicle
 - Extract all in excel for just fleet or by DVLA data
- A great page to see your fleet and then navigate from here

a. Create and Edit Vehicle - Adding a Vehicle



The screenshot shows the 'Create & Edit Vehicle' form. On the left is a sidebar menu with options like Dashboard, Team, Vehicles, Checks/Inspections, etc. The main form has the following fields:

- Vehicle Registration: [Text Input]
- Vehicle ID: [Text Input]
- Company: [Dropdown Menu - Paragus Child]
- Type: [Text Input]
- Category: [Dropdown Menu - OTHER]
- Vehicle Start: [Text Input]
- Mileage: [Text Input]
- Date Mileage: [Text Input]
- Vehicle Supplier: [Text Input]
- Checks: All Checks
- Load Vehicle Data:

At the bottom of the form are three buttons: 'End Vehicle' (red), 'Cancel' (grey), and 'Submit' (blue).

In this section you can add a new vehicle:

- Enter the vehicle registration
- Enter Vehicle ID (Optional)
- Enter Depot – if multisite
- Enter Type – Optional data
- Use dropdown to add category – this is critical as the default is standard charge – if your category is not in the dropdown contact support@checkedsafe.com to assist (you can update this later so it will not hold you up waiting)
- Enter Start date
- Enter Mileage/Hours (Optional) – but critical if your going to use scheduling based on mileage/hours
- Enter Date of Mileage/Hours (Optional)
- Enter Supplier – useful if you have a lease vehicle or have maintenance by 3rd party
- All Checks is ticked by default which means whatever is allocated this vehicle will see all - you can filter out which will be assigned to the vehicle
- Tick (or not) load vehicle data – this will bring in the V5 data
- Submit

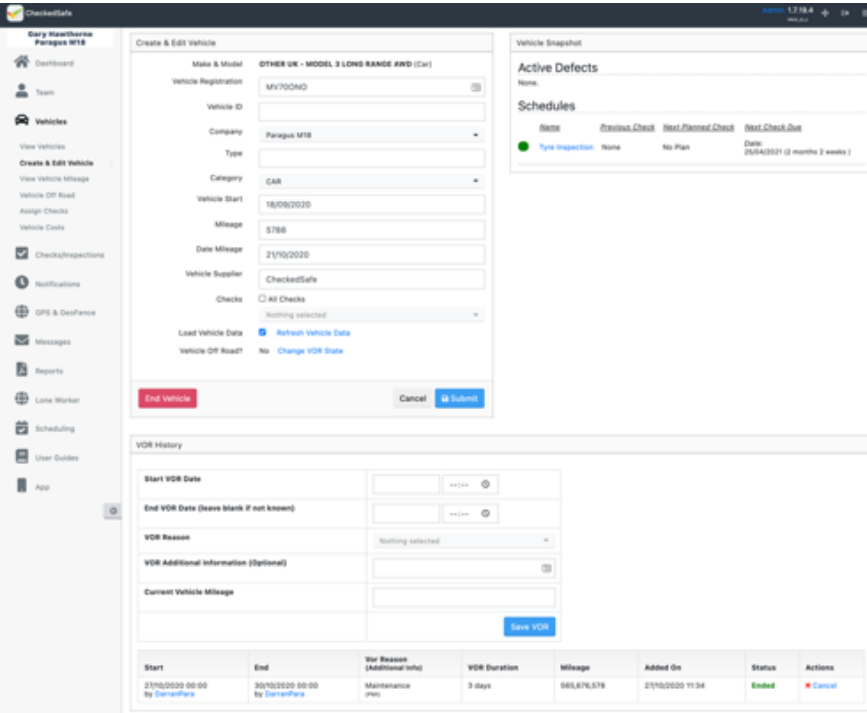
Note: If you get a message vehicle already in the system this could be in another depot if you have multisites in our system and it could be VOR or Ended, you can at this stage contact support@checkedsafe.com or if you have a Head Office administrator they can move that vehicle for you

b. View the Vehicle Folder

When viewing the vehicle folder there is a host of information to look at in this section and has the liking of a filing cabinet drawer for all your vehicle documents

The top section you can:

- **Create and Edit Vehicle** - See the V5 Make and model from the load vehicle data tick
- **Vehicle Snapshot** - you can see all active defects, any scheduled items and document reminders for this vehicle on this screen
- **End the vehicle** – if it is sold off or scrapped you can end the vehicle here – the data will be archived and available at any time via the view vehicle screen by filtering ended vehicles – if you end it in error contact support@checkedsafe.com and we will un-end it.
- **VOR history** - and also enter VOR data in this section (you can only VOR a vehicle within the same ISO week (Monday to Sunday) and mileage is enforced).



The screenshot displays the 'Create & Edit Vehicle' form with the following details:

- Make & Model:** OTHER UK - MODEL 3 LONG RANGE AWD (Car)
- Vehicle Registration:** MY70DMD
- Company:** Paragus M3B
- Category:** CAR
- Vehicle Start:** 18/08/2020
- Mileage:** 5788
- Date Mileage:** 21/10/2020
- Vehicle Supplier:** CheckedSafe
- Checks:** All Checks (Nothing selected)
- Load Vehicle Data:** Refresh Vehicle Data
- Vehicle Off Road?:** No (Change VOR State)

The **Vehicle Snapshot** section shows:

- Active Defects:** None
- Schedules:**

Name	Previous Check	Next Planned Check	Next Check Due
Type Inspection	None	No Plan	Date: 20/04/2021 (2 months 2 weeks)

The **VOR History** section includes a form to enter VOR data and a table of history:

Start	End	Vor Reason (Additional info)	VOR Duration	Mileage	Added On	Status	Actions
21/10/2020 00:00 By: DarcusPars	30/10/2020 00:00 By: DarcusPars	Maintenance PM	3 days	585,676,578	21/10/2020 11:34	Ended	Cancel

The bottom section of this page you can:

- **Vehicle Mileage** - See all the vehicle mileage history and enter mileage manually if required – there is more information further on
- **Generate report for Vehicle** - Run a general vehicle report on this particular vehicle if required
- **Vehicle Documents** - You can upload all and any vehicle documents here and set yourself a Notification – click Create Notification, enter details and this will then notify you at that data and you can download the document if you need to send/print it
- **Check/Inspection Documents** - any documents attached to any check in the back office can be found here i.e., a receipt or job card for a pre-use defect reported and cleared that you uploaded to the check is stored here for easy auditing

Vehicle Mileage

Enter Mileage:

[Add Mileage](#)

Weekly Average: N/A

Date	Mileage	User	From Check
21 Oct 2020 10:18:57	5,788	DarranPara	DVSA Minibus Daily Check

Showing most recent (View All)

Generate Report for Vehicle

Generate Vehicle Report

Report From:

Report To (blank for today):

Generate Report For All Vehicles:

Check/Inspection to Report on: Park-Generic Plant Daily Inspections

Order By: Date

[Excel](#) [PDF](#)

Vehicle Documents

Upload Vehicle Document

Document Type:

Document Notes:

Start Date (if applicable):

Expiration Date (if applicable):

Upload Vehicle Document (max 250 MB) [Choose file](#) No file chosen

[Upload](#)

Vehicle Documents

Document Type	Filename	Notes	Start Date	Expiration Date	Uploaded On	Notification	Actions
MOT reminder	MOT Failure Example.jpg	Uploaded by D.J.H	08/10/2020		08/10/2020 13:49:36	Active Next: 23/10/2021	Download Cancel Notification Delete Document
MOT reminder	MOT Failure Example.jpg	Uploaded by D.J.H	29/09/2020		29/09/2020 16:35:05	Not Active	Download Create Notification Delete Document
Insurance Due date	Corporate manslaughter charge not pursued despite double death ... Tax and legislation news.pdf	Uploaded by D.J.H	25/09/2020		25/09/2020 10:47:40	Active Next: 16/10/2021	Download Cancel Notification Delete Document

Check/Inspection Documents

Added By	Added On	Note	Document	View Check
DarranPara	21/10/2020 10:37:08	repair invoice attached from auto glass	Sample Repair Invoice 2.jpg	View Check

c. View Vehicle Mileage

In the view vehicle mileage section, you can interrogate the mileage further and update if someone has added the wrong mileage – this section is also good for hours recording for plant and machinery.

- [Vehicles](#)
- [View Vehicles](#)
- [Create & Edit Vehicle](#)
- View Vehicle Mileage**
- [Vehicle Off Road](#)
- [Assign Checks](#)
- [Vehicle Costs](#)
- Checks/Inspections
- [Notifications](#)
- [GPS & Geofence](#)
- [Messages](#)

(Auto select sub-depots)

[Excel](#) [Clear](#)

Vehicle Reg	Vehicle/Equipment ID	Mileage	Added On	Added By	Source	Actions
CSHGV (Paragus M18)	CheckedSafe HGV	12,000	07/02/2021 (3 days ago)	GaryPara (Paragus M18)	CS-DVSA HGV-LGV PMI 191218	<input type="text"/> ✓ Confirm ⚠ Mark Invalid
MWB8YKE (Paragus Child)	Electric Car	12,000	31/12/2020 (1 month, 1 week ago)	GaryPara (Paragus M18)	CS-DVSA HGV-LGV PMI 191218	<input type="text"/> ✓ Confirm ⚠ Mark Invalid
CSHGV (Paragus M18)	CheckedSafe HGV	12,000	09/02/2021 (1 day ago)	DarranPara (Paragus M18)	CS-Truck Only 020119	<input type="text"/> ✓ Confirm ⚠ Mark Invalid

d. Vehicle Off Road

The history data is recorded here for all VOR events – you must always enter VOR mileage as this can be audited against tacho data if required, this view is a filter showing all live VOR vehicles, you can update the status here. As part of our good practice, we ask if a VOR is over two week you should really do a PMI and we ask to add a note relating to this. Again you can run an excel report here that will give you a full breakdown of your fleet VOR

- [Daily HealthCheck Paragus M18](#)
- [Dashboard](#)
- [Vehicles](#)
- [View Vehicles](#)
- [Create & Edit Vehicle](#)
- View Vehicle Mileage**
- [Vehicle Off Road](#)
- [Assign Checks](#)
- [Vehicle Costs](#)
- Checks/Inspections
- [Notifications](#)
- [GPS & Geofence](#)
- [Messages](#)
- [Reports](#)
- [Data Backup](#)
- [Help](#)

View Off Road

VOR Reason: VOR Status:

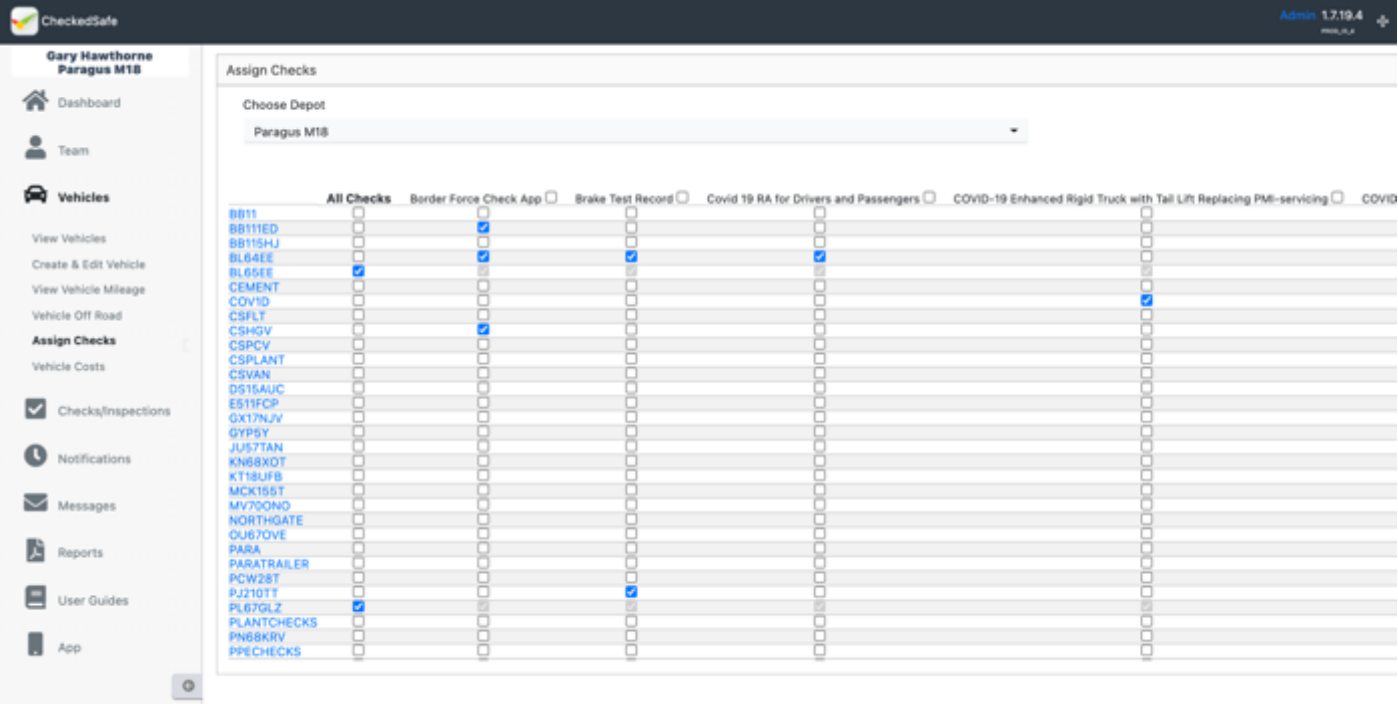
VOR Note: Vehicle Registration:

[Excel \(24\)](#) [Clear](#)

Vehicle	Start	End	VOR Reason (dropdown menu)	VOR Duration	Mileage	Added On	Status	Actions
PL1212	14/12/2020 00:00	14/12/2020 00:00	Accident	14 days	1,800	14/12/2020 10:58	Ended	Cancel
PL1212	09/12/2020 00:00	By Date/Time	VOR until manually ended		9,800	09/12/2020 16:40	Active	End VOR Cancel
PL1212	09/12/2020 00:00	By Date/Time	VOR until manually ended		9,878	09/12/2020 17:02	Active	End VOR Cancel
PL1212	02/12/2020 00:00	By Date/Time	Off site	14 days	9,878	02/12/2020 10:55	Ended	Cancel
WMB8YKE	01/12/2020 10:00	By Date/Time	Swapping site on site	88 days	11,465	09/12/2021 16:46	Ended	Cancel
WMB8YKE	26/11/2020 00:00	27/11/2020 08:18	Swapping	2 days	7,000	25/11/2020 14:40	Ended	Cancel

e. Assign Checks

In this section you can tailor what users can see, this cuts down the margin for error. If you have lots of templates and not all users need them then you can assign templates to the vehicle/asset and this will cut down what they can see and use via the app

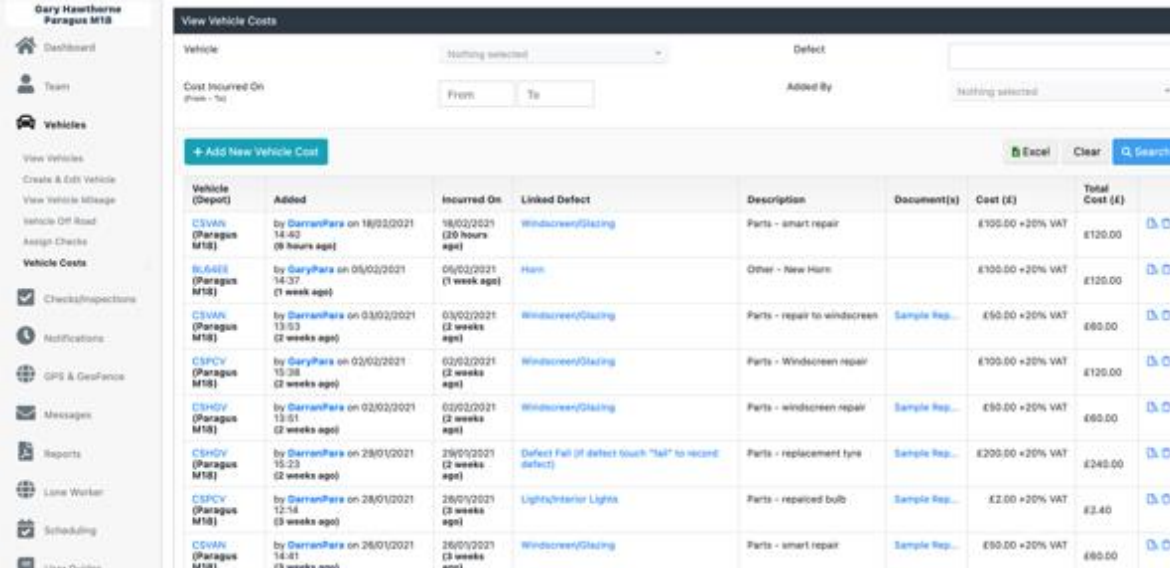


The screenshot shows the 'Assign Checks' screen for a depot named 'Paragus M18'. It features a table with columns for different check types and rows for individual vehicles. Some checkboxes are already selected, indicating that certain checks are assigned to those vehicles.

Vehicle	All Checks	Border Force Check App	Brake Test Record	Covid 19 RA for Drivers and Passengers	COVID-19 Enhanced Rigid Truck with Tail Lift Replacing PMI-servicing	COVID
BB11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BB11ED	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BB115HJ	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BL64EE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BL65EE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COV1D	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CSPLT	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CSHGV	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CSPCV	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CSPANT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CSVAN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DS15AUC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ES11FCP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GX17NJV	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GYP5Y	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JU57TAN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KN68XDT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KT18UFB	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MCK16BT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MV700NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NORTHGATE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OU67QVE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PARA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PARATRAILER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PCW28T	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PJ210TT	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PL67GLZ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PLANTCHECKS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PN68KRV	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPECHECKS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

f. Vehicle Costs

Here is a where you can add cost incurred for your vehicle /asset, by clicking vehicle cost on the menu bar it will take you to this page which is a summary of any costs you have added to the system, you can see again all hyperlinks back to vehicle, driver, defect any documents attached to the cost analysis and the cost. You can filter this page by vehicle ID, date, or defect to get a more defined costing against that vehicle.



The screenshot shows the 'View Vehicle Costs' screen. It includes a table with columns for Vehicle (Depot), Added, Incurred On, Linked Defect, Description, Document(s), Cost (£), and Total Cost (£). A '+ Add New Vehicle Cost' button is visible at the top left of the table area.

Vehicle (Depot)	Added	Incurred On	Linked Defect	Description	Document(s)	Cost (£)	Total Cost (£)
CSVAN (Paragus M18)	by DarrenPara on 18/02/2021 14:40 (8 hours ago)	18/02/2021 (20 hours ago)	Windscreen/Glazing	Parts - smart repair		£100.00 + 20% VAT	£120.00
BL64EE (Paragus M18)	by GaryPara on 05/02/2021 14:37 (1 week ago)	05/02/2021 (1 week ago)	Horn	Other - New Horn		£100.00 + 20% VAT	£120.00
CSVAN (Paragus M18)	by DarrenPara on 03/02/2021 13:53 (2 weeks ago)	03/02/2021 (2 weeks ago)	Windscreen/Glazing	Parts - repair to windscreen	Sample Rep...	£90.00 + 20% VAT	£90.00
CSPCY (Paragus M18)	by GaryPara on 02/02/2021 15:38 (2 weeks ago)	02/02/2021 (2 weeks ago)	Windscreen/Glazing	Parts - Windscreen repair		£100.00 + 20% VAT	£120.00
CSHGV (Paragus M18)	by DarrenPara on 02/02/2021 13:51 (2 weeks ago)	02/02/2021 (2 weeks ago)	Windscreen/Glazing	Parts - windscreen repair	Sample Rep...	£90.00 + 20% VAT	£90.00
CSHGV (Paragus M18)	by DarrenPara on 28/01/2021 15:23 (2 weeks ago)	28/01/2021 (2 weeks ago)	Defect Fall (if defect touch "fall" to record defect)	Parts - replacement tyre	Sample Rep...	£200.00 + 20% VAT	£240.00
CSPCY (Paragus M18)	by DarrenPara on 28/01/2021 12:14 (3 weeks ago)	28/01/2021 (3 weeks ago)	Lights/Interior Lights	Parts - replaced bulb	Sample Rep...	£2.00 + 20% VAT	£2.40
CSVAN (Paragus M18)	by DarrenPara on 26/01/2021 14:41 (3 weeks ago)	26/01/2021 (3 weeks ago)	Windscreen/Glazing	Parts - smart repair	Sample Rep...	£90.00 + 20% VAT	£90.00

+ Add New Vehicle Cost

Enter all details in each section as below, you can upload documents/receipts to this section which then ring fences the cost process (note: if it relates to a defect then ensure you add that information)

Add Vehicle Cost

Vehicle: Nothing selected

Link Cost to Defect?: Nothing selected

Cost Incurred Date:

Is Recurring Cost:

Cost Detail

Category: Other

Summary:

Description:

Cost (ex. VAT):

VAT Rate: 0%

Cost (inc. VAT):

Upload Invoice / Receipt:

Drag files here, or click to upload (PDF / Image)

[\(-\) Remove Vehicle Cost Detail](#)

[\(+*\) Add Another Vehicle Cost Detail](#)

Cancel
Save

5. Checks/Inspections

This section you can view all your current checks a great page for a full overview of you daily checks

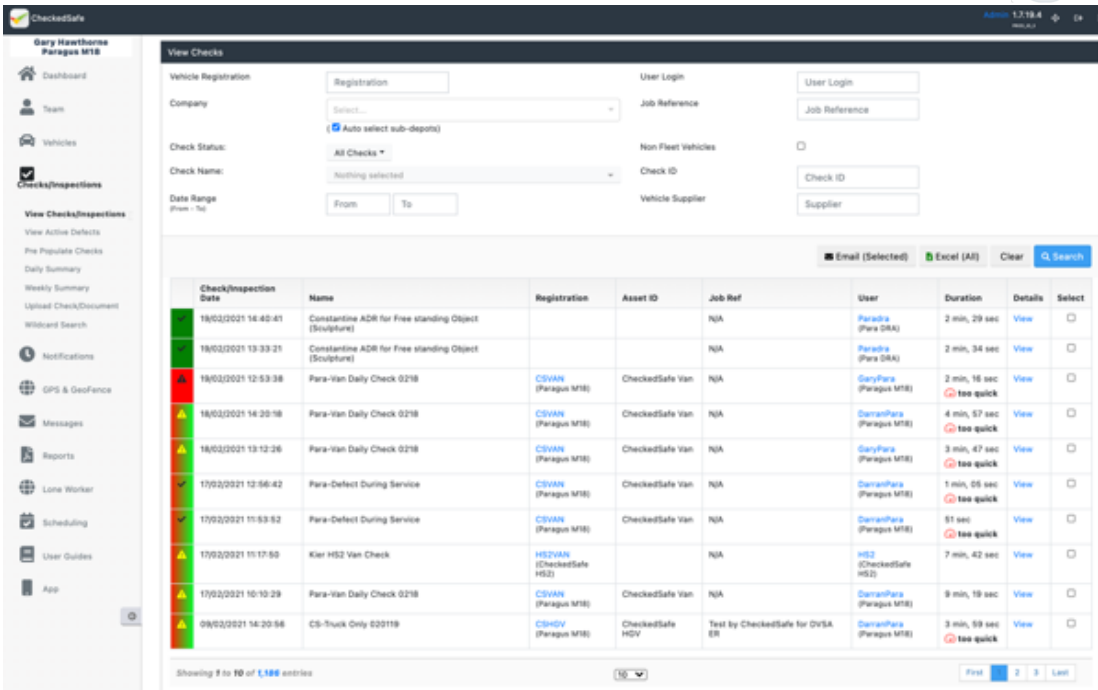
You can Filter by:

- Vehicle Registration
- Company (depots) if you have regional depots you can view all or individual
- Check Status (use the drop down for All checks, No Defects, Active Defects, Active Serviceable, Defects Cleared, Defects and warnings Cleared)
- By user Login
- By Job Reference (if used)
- Non-Fleet vehicles
- By Check ID every check if you look will have a unique ID number at the top of the check under the “Checked By” name
- By Supplier

The data on this page provides information by date/time, check name, vehicle/asset ID and hyper link, user ID and Hyperlink, timing of the check and a hyperlink to the check ([View](#)). You can also select this or multiple checks by ticking the select box and you can email to anyone (multiple emails must have a comma separator).

The colour coding on the left of the main page is:

- Green – Nil Defect
- Red fading to Green with a tick is initial defect but straight clear
- Red fading to Green with a Yellow triangle is a defect that was made serviceable then cleared
- Red is Defect still active



5.i Viewing Checks – the full details

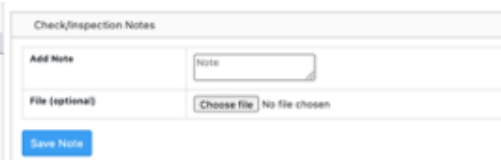
From the view checks page you can view the details of any check by clicking the blue “View” link at the far right of the table

The top section provides details of:

- Where the user did the check (Map)
- User details (hyperlink back to folder)
- Vehicle details ((hyperlink back to folder)
- Send a quick message to the user
- Timing of check and indication is slow or fast if you have preset times
- Thumbnail photos
- Options to [View Gallery](#) (expands the thumbnails), [Generate PDF Report](#) (Summary), [Generate Excel](#) (Summary), [Check as PDF \(All Images\)](#) – PDF with all photos, [Check as PDF \(Selected images\)](#) - tick the images you wish to include on the PDF, [Email Check](#) – email the Check and ODF to anyone you wish






The next section shows you the area that you can upload documents to, ensuring your ringfencing compliance and also storing proof of compliance against the defectreported and in the vehicle folder



In the main body of the check, you can see full details of the question, the answer (Value), Failure Reasons and our UPS which is the compass and elapsed time (we use the compass in the device to track movement around the asset whilst checking and also we take a time stamp on each question).

This section also allows you to now manage the defects which can be found after this section

Check/Inspection Name	Value	Failure Reason	Compass / Elapsed Time	Notes	Image(s)
Page 1 (Minimum Guidance Time: 00:20 (User Time: 00:25))					
Photo of Vehicle Registration Plate			00 sec		
Driving License and DVPE card present	Pass		00 sec		
Enter Mileage Reading	123456		10 sec		
Date/Time Picker			00 sec		
Page 2					
Fuel Level	5/4		00 sec		
Fire Extinguisher	N/A		00 sec		
First Aid Kit	N/A		00 sec		
Wipers/Washers/Screenswash Level	Pass		00 sec		
Windows/Windicing	Fail	Cracked rear-side corner	00 sec		
Mirrors	Pass		00 sec		

The last section on this report provides information on the user's device, model, version, and if permission has been granted or not for Camera and GPS

Check/Inspection Device Information	
Platform	Android
Model	SM-N960F
Android Version	10
App Version	2.0.6-5
Camera Granted Permission	true
GPS Granted Permission	true

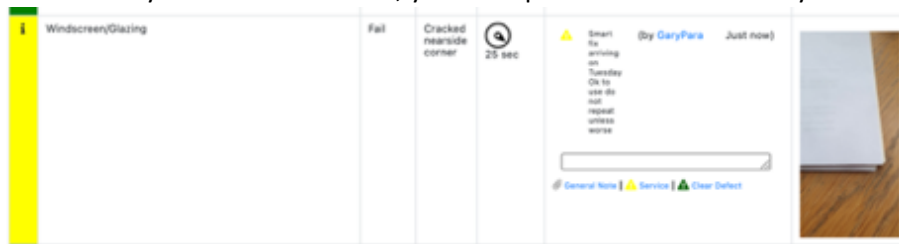
5.ii Managing the Check - Making Serviceable

This is how you can make a defect serviceable reducing the users requirement to repeat unnessary defects

Enter the details into the box as below clearly giving the driver instructions and press serviceable



Yellow now pressed you can see the notes and also the next time a driver logs into his phone he will see the information you have added here, you can update this area as many times as you wish prior to final defect sign off



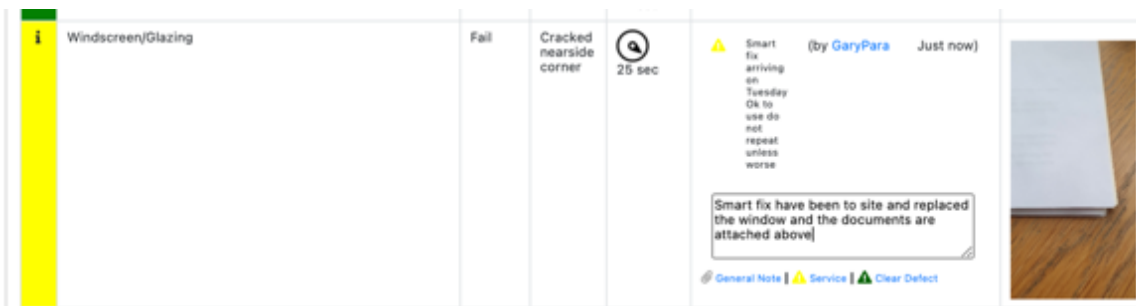
At the top of the view check area you will have seen a summary this now starts to flesh out summarising the actions taken and tagging date/time and user so you have a full trail of compliance

Check/Inspection Status Information	
Check/Inspection Status	FAILED
Defect Reported	Cracked nearside corner , Horn not working ,
Back Office Notes	Check Item: Windscreen/Glazing Serviceable Note: Smart fix arriving on Tuesday Ok to use do not repeat unless worse Serviced By: GaryPara Serviced On: 2021 Feb 19 18:36 *** Check Item: Horn ***

5.iii Clearing Defects

This section will show you now the full sign off of the defects these could be from Red Defect or from a Yellow Serviceable defect the process is the same for both.

Enter the details to clear the defect off (you can enter as much as you wish



Once you have pressed Clear Defect you will now see that the defect has gone green and your notes are now in the box under the serviceable notes now with a Green triangle – again time/date and user are tagged



The summary section at the top of the check has now fleshed out showing the full compliance trail time stamped and with users name

Check/Inspection Status Information	
Check/Inspection Status	FAILED
Defect Reported	Cracked nearside corner , Horn not working ,
Back Office Notes	Check Item: Windscreen/Glazing Serviceable Note: Smart fix arriving on Tuesday Ok to use do not repeat unless worse Serviced By: GaryPara Serviced On: 2021 Feb 19 18:36 Cleared Note: Smart fix have been to site and replaced the window and the documents are attached above Cleared By: GaryPara Cleared On: 2021 Feb 19 18:43 --- Check Item: Horn ---

5.iv Adding documents to the check

This is your final process to ring fence the whole compliance process, uploading a document against the defect, you can upload a receipt, job card, warranty etc.

In the Checks/Inspection notes add a note and attach the relevant file you wish to add

Check/Inspection Status Information	
Check/Inspection Status	PASSED
Defect Reported	Nearside corner crack , Horn not working ,
Back Office Notes	Check Item: Windscreen/Glazing Serviceable Note: Smartfix arriving Wednesday all to use dont repeat unless worse Serviced By: GaryPara Serviced On: 2021 Feb 18 13:20 Serviceable Note: Delayed until thursday Serviced By: GaryPara Serviced On: 2021 Feb 18 13:21 Cleared Note: Smartfix on site replared crack and docs attached Cleared By: GaryPara Cleared On: 2021 Feb 18 13:22 --- Check Item: Horn Cleared Note: Wiring fix all ok Cleared By: GaryPara Cleared On: 2021 Feb 18 13:20 ---

Check/Inspection Notes	
Add Note	<input type="text" value="Note"/>
File (optional)	Choose File no file selected
<input type="button" value="Save Note"/>	

Once saved you can now see the document attached –

Check/Inspection Status Information

Check/Inspection Status	PASSED
Defect Reported	Nearside corner crack , Horn not working ,
Back Office Notes	Check Item: Windscreen/Glazing Serviceable Note: Smartfix arriving Wednesday all to use dont repeat unless worse Serviced By: GaryPara Serviced On: 2021 Feb 18 13:20 Serviceable Note: Delayed until thursday Serviced By: GaryPara Serviced On: 2021 Feb 18 13:21 Cleared Note: Smartfix on site repaired crack and docs attached Cleared By: GaryPara Cleared On: 2021 Feb 18 13:22 --- Check Item: Horn Cleared Note: Wiring fix all ok Cleared By: GaryPara Cleared On: 2021 Feb 18 13:20 ---

Check/Inspection Notes

Add Note:

File (optional): no file selected

Added By	Added On	Note	Document
GaryPara	18/02/2021 13:23:37	Windscreen doc repaired docs	Screenshot 2020-11-18 at 07:19:44.png

The document is also stored in the vehicle folder under the section **Check/Inspection Documents**

Check/Inspection Documents				
Added By	Added On	Note	Document	View Check
DarranPara	30/11/2020 11:30:29	invoice	Sample Repair Invoice 2.jpeg	View Check
DarranPara	02/12/2020 09:59:35	repair invoice	Sample Repair Invoice 2.jpeg	View Check

NOTE: The above section on managing the defect process this isn applicable across ALL checks, If a PMI has been completed this is the same process:

- Complete the PMI on a tablet identifying any defects – making notes/taking photos (if the defect can be repaired at the same time add those notes into the fail section)
- Once submitted the back office can be updated with what has been done to rectify the defect just the same as managing the pre-use daily check defect
- Uploading documents dsuch as Brake Test, Tacho check etc. is essential as this keeps all the PMI documents in one place and attached
- Once completed the TM can them have a final sign off on the back office to confirm that the vehicle is fit for service

PMI Signoff (this check requires sign off after cleared defects)

Are you sure you want to sign off on this Roger? Further notes:

5.v Send a message to the App

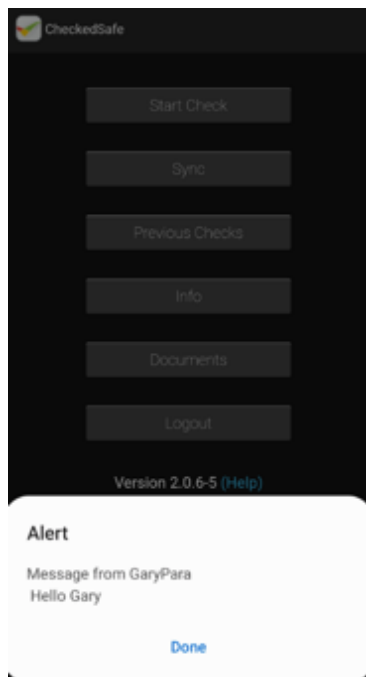
There are a couple of options to sending out messages one is via the check

Gary Hawthorne
Paragus M18

- Dashboard
- Team
- Vehicles
- Checks/Inspections**
- View Checks/Inspections**
- View Active Defects
- Pre Populate Checks

Check/Inspection Information	
Checked By	GaryPara (07914756566)
Check ID	7,273,312
Send Operator Notification	<input type="text" value="Hello Gary"/> Send
Name	Para-Van Daily Check 0218
Registration	CSVAN
Job Reference	
Date	18/02/2021 (13:12:26 to 13:16:13) Check duration 3 min, 47 sec. Quicker than the minimum guidance duration of 5 min, 00 sec 🚗

Once you press send the message will pop up on the user's device as below



5b. View Active Defects

You can short cut to viewing defects by clicking view active defects from the left-hand menu, this section pulls all active and/or serviceable defects (you can filter at the top on current status). From here you can action

You can filter by Depot, User Login, by supplier (very handy if you block hire vehicles from a supplier), by Vehicle Reg and by date range.

User	Registration / ID	Check	Item	Note	Images (hover to enlarge)	View
GaryPara (Paragus M18)	CSVAN / CheckedSafe Van	Para-Van Daily Check 0218 (24/02/2021 17:23 - 3 minutes ago)	Wipers/Washers/Screenwash Level Fail Wiper blade broken nearside			View
GaryPara (Paragus M18)	CSVAN / CheckedSafe Van	Para-Van Daily Check 0218 (24/02/2021 17:23 - 3 minutes ago)	Mirrors Fail Bent offside mirror arm			View
GaryPara (Paragus M18)	CSVAN / CheckedSafe Van	Para-Van Daily Check 0218 (24/02/2021 17:23 - 3 minutes ago)	Seats/Seat Belts Fail Seat belt fastener broken			View
GaryPara (Paragus M18)	CSVAN / CheckedSafe Van	Para-Van Daily Check 0218 (24/02/2021 17:23 - 3 minutes ago)	Horn Fail Horn not working			View
GaryPara (Paragus M18)	CSVAN / CheckedSafe Van	Para-Van Daily Check 0218 (24/02/2021 17:23 - 3 minutes ago)	Fuel/Oil Leaks Fail Oil leak under gearbox			View

5c. Pre-Populated Checks

This section you can pre-populate checks in the template – this can be useful for person who have equipment with serial numbers to check you can prepopulate that serial number to match the user or for anything that you want to be checked.

Choose depot then choose the user or users

Choose the template you wish to pre-populate

You can then pre-populate the sections you require – as you have tagged the user this will then appear on that user’s login when they undertake a check using that template.

Pre Populate Check Items

Step 1. Choose Depot: Paragus M18

Step 2. Choose Operator: GaryPara

Step 3. Choose Check: Border Force Check App

Step 4. Populate Items

Job Ref:

Location (address of where you are):

Trailer ID Number:

Enter Seal Padlock Number:

Further Notes if Required:

NOTE: you will need to update this each time if they change and do it for each staff member if the data is different for each one for example if you think of a harness for a tree surgeon, they have numbers unique to each harness tagged to the person

5d. Daily Summary

One of our favourite features you will have seen in the staff profile section the options to have a daily email the screen shot below is the daily email – in addition at any time to click daily summary from the left-hand menu it's a live look up at the last hour. This is your daily summary of what has happened and from here you can dive into the back office and manage accordingly OR if all looks ok you can carry on with your days' work knowing that all is in order

CheckedSafe
Gary Hawthorne
Paragus M18

Daily Summary - 24/02/2021 - 00:00 to 17:00
Active Defects Raised Against Road Safety Critical Items

- CSVAN Bent offside mirror arm Mirrors 25 minutes ago
- CSVAN Horn not working Horn 25 minutes ago
- CSVAN Oil leak under gearbox Fuel/Oil Leaks 25 minutes ago

Paragus M18
4 Checks Completed - 3 No Defects | 0 Serviceable Defects | 1 Defects

CS-Van Daily Check 201218
Completed at 10:00 | No Defects

Para-Van Daily Check 0218

CSVAN at 10:11 | No Defects

CSVAN at 14:04 | No Defects

CSVAN at 17:23 | No Defects

- Wiper Blade broken rearward
- Bent offside mirror arm
- Front left indicator broken
- Horn not working
- Oil leak under gearbox
- Wipers/Washer/Sunscreen Level
- Mirrors
- Seats/Seat Belts
- Rims
- Fuel/Oil Leaks

23 Vehicles Not Checked

- BLRBE
- SK7ZGL
- WRBUE
- PAK6
- KT-BLUB
- QUEPOE
- WBY
- KMGXKOT
- PLANTCHECKS
- WRECHECKS
- PARATRAILER
- JUSTIAN
- STREY
- NORTHGATE
- POWREFF
- OSMANUC
- CSPLANT
- PAJNETS
- MATSOND
- CEMENT
- CSFL
- CSNDV
- CSPCV

4 Checks Completed by 2 Drivers

- DarrenPara 14:06 CSVAN Para-Van Daily Check 0218 | too fast 4 min, 44 sec
- DarrenPara 23:00 BBT19ED CS-Van Daily Check 201218
- GaryPara 10:01 CSVAN Para-Van Daily Check 0218 | too fast 3 min, 18 sec
- GaryPara 17:23 CSVAN Para-Van Daily Check 0218 | too fast 3 min, 07 sec

2 Drivers Not Completed a Check

- Christopharmia? | demo set up!

The report is self-explanatory as you can see above a great way to assist you managing your fleet on a daily basis


5e. Weekly Summary

Following one of our favourite features you will have seen in the staff profile section the options to have a weekly email the screen shot below is the weekly email – in addition at any time to click weekly summary from the left-hand

menu it's a live look. This is your weekly summary of what has happened and what is coming up from your schedules and notifications, from here you can dive into the back office and manage accordingly OR if all looks ok you can carry on with your weeks work knowing that all is in order.

Gary Hawthorne
Paragus M18

- [Dashboard](#)
- [Team](#)
- [Vehicles](#)
- [Checks/Inspections](#)
- [View Checks/Inspections](#)
- [View Active Defects](#)
- [Pre Populate Checks](#)
- [Daily Summary](#)
- Weekly Summary**
- [Upload Check/Document](#)
- [Wildcard Search](#)
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- [GPS & GeoFence](#)
- [Messages](#)
- [Reports](#)
- [Lone Worker](#)
- [Scheduling](#)
- [User Guides](#)
- [App](#)



Date:

Weekly Summary - 17/02/2021 to 23/02/2021

Total Checks Done 7	Total Defects Raised 12
Defects Cleared 12	Defects Made Serviceable 0
Defects Outstanding 0	

Upcoming Planned and Required Vehicle Maintenance 24/02/2021 to 02/03/2021

Required	Inspection Needed	Due on (or before)	Schedule name
BB11ED	LFS Service Record	28/02/2021 23:59:59	1000 Mile Service
PN68KRV	LFS Service Record	28/02/2021 23:59:59	1000 Mile Service
MW69PXE	CS-DVSA HGV-LGV PMI 191218	28/02/2021 23:59:59	8 Weekly PMI
CSVAN	LFS Service Record	28/02/2021 23:59:59	1000 Mile Service

Planned	Inspection Needed	Due on (or before)	Schedule name
PN68KRV	CS-DVSA HGV-LGV PMI 191218	24/02/2021 23:59:59	8 Weekly HGV PMI

Documentation Reminders Upcoming This Week 24/02/2021 to 02/03/2021

ES11FCP Document Type "Brake Roller Test" with document name "Sample Brake Test Result.jpeg" is due on 26/02/2021 00:00

CSVAN Document Type "MOT certificate" with document name "MOT Fail-certificate-dangerous-circled.jpg" is due on 27/02/2021 00:00

Mini Mouse Document Type "Manual Handling Training" with document name "HSE New Job risks training and induction.pdf" is due on 02/03/2021 00:00

KirstyPara Document Type "Driver Training Record" with document name "Digital Daily Checks Training Consent Record.docx" is due on 27/02/2021 00:00

GaryPara Document Type "Dvr License Check Gary" with document name "20170120_131321.jpg" is due on 26/02/2021 00:00

Active Defects Raised Against Road Safety Critical Items

- CSVAN Bent offside mirror arm [Mirrors](#) 26 minutes ago
- CSVAN Horn not working [Horn](#) 26 minutes ago
- CSVAN Oil leak under gearbox [Fuel/Oil Leaks](#) 26 minutes ago

Driver Check Timing Performance 17/02/2021 to 23/02/2021

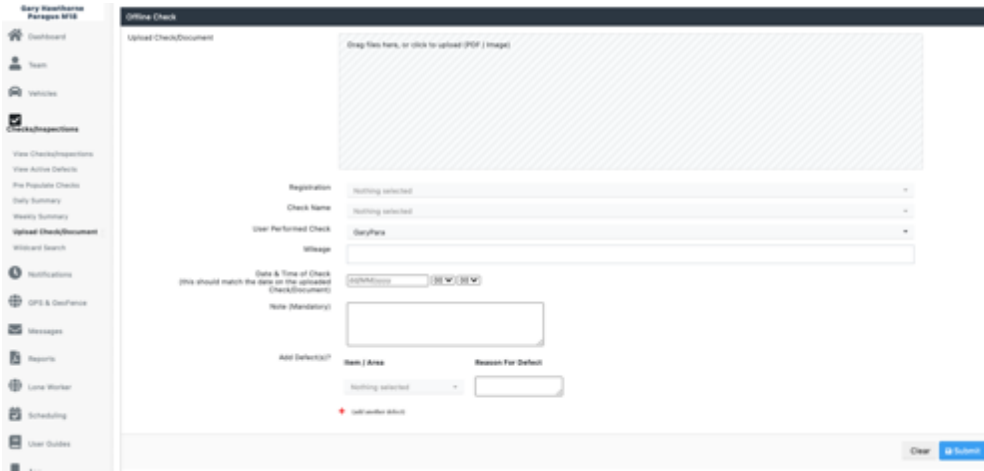
	Check Name	Average Check Length	Min. Guidance Duration	+/- From Guidance
GaryPara	Para-Van Daily Check 0218	3 min, 13 sec	5 min, 00 sec	1 min, 47 sec shorter than guidance
DarranPara	Para-Defect During Service	58 sec	2 min, 00 sec	1 min, 02 sec shorter than guidance
DarranPara	Para-Van Daily Check 0218	7 min, 08 sec	5 min, 00 sec	

Active & Outstanding Defects

- CSVAN Wiper blade broken nearside [Wipers/Washers/Screenwash Level](#) 26 minutes ago
- CSVAN Seat belt fastener broken [Seats/Seat Belts](#) 26 minutes ago

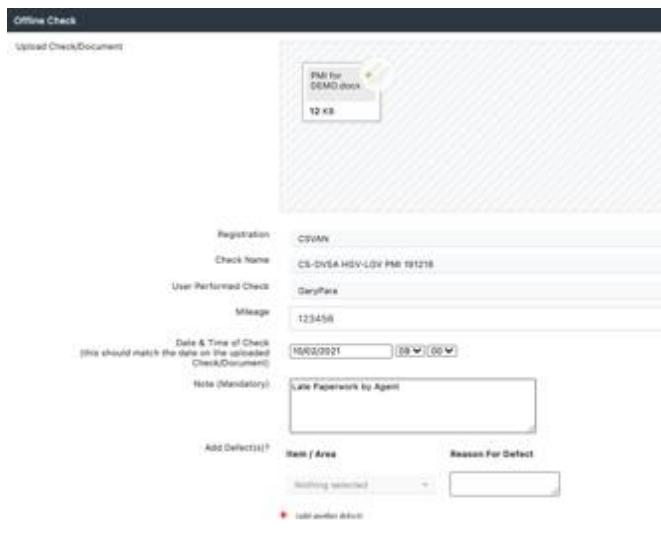
5f. Upload Check Document

You can pull in paper documents and digitise them adding them to your fleet system on our back office – great feature if your maintenance is completed by a 3rd party provider, the screen shots below will show you the process



Drag in the paper PMI enter the Registration, enter the template you wish to tag the check too (this is critical as its digitising the data from paper to template – if you do not have a template suitable contact support@checkedsafe.com, enter date and time (you can out anytime – but do put a time other than 00:00) of inspection - not today's date unless it was done today as it tags both the date of inspection and date of upload and if your using the scheduler if the date is not correct here it will throw the schedules out .

Adding a note is mandated



You can now add defects if any have been identified as defects outstanding as you have tagged the PDF to a template that now allows you to add defects as required.

NOTE: if there are "serviceable defects" you can add it here as a defect then follow the procedure as previously discussed on how to make Serviceable

The screenshot shows the 'Offline Check' form. On the right side, there is a list of inspection items with checkboxes, including:

- Photo of Vehicle to be Inspected showing Registration Plate
- Vehicle Registration/ID
- Make and Type
- Mileage
- Tacho Read Date (date on seal)
- Ground Level Checks
- 1 - Registration Plates
- 6 - Road Wheels and Hubs, Half shaft Bolts/Nuts/Stub
- 9 - Side guard/steer under run devices and bumper bars
- 10 - Spare wheel carriage/security
- 11 - Trailer drawing eye hook/fit wheel or auto coupling
- Ground Level Checks Cont.
- 14 - Condition of wings/body suppression and wheel arches
- 16 - Cab mountings
- 16 - Cab doors
- 17 - Cab floor and steps
- 18 - Body, square on chassis/security of fittings to chassis
- 20 - Body/boundaries/doors/hinges/step electrical boards/steering gear
- Ground Level Checks Cont.
- 22 - Mirrors and indirect vision devices (number and condition)
- 26 - Tachograph seats
- 33 - Speed Limiter
- 62 - Rear markings/colour/position and function
- 63 - Obligatory side lamps - position and function
- 63 - Obligatory rear and fog lamps - position and function
- Ground Level Checks Cont.
- 63 - Rear and side markers - position and function
- 66 - Directional indicators colour/functioning/heights
- 63 - Obligatory Stop lamps - position and function
- General Checks

 On the left side, there are input fields for:

- Registration
- Check Name
- User Performed Check
- Mileage
- Date & Time of Check (this should match the date on the uploaded Check/Document)
- Note (Mandatory)
- Add Defect(s)?

You can add as many defects as you see fit tagging them to the template as above

The screenshot shows the 'Offline Check' form with a document upload area. A file named 'PMI for DEMO.docx' (12 KB) is shown as uploaded. Below the upload area, there are input fields for:

- Registration: CSVAN
- Check Name: CS-DVSA HGV-LGV PMI 191218
- User Performed Check: GaryPara
- Mileage: 123456
- Date & Time of Check (this should match the date on the uploaded Check/Document): 10/02/2021 09:00
- Note (Mandatory): Late Paperwork by Agent

 At the bottom, there is a table for 'Add Defect(s)?':

Item / Area	Reason For Defect
11 - Trailer drawing eye hook/ -	Broken
Cab Height Indicator -	Missing
Nothing selected -	

Once the PDF has now been digitised you can see it on the back office with all the other checks, you will see under the heading "Duration" the word manual this means you have uploaded it manually on a PDF, it does not have the same controls in place but when you click to view the check you will see any defects you have added and also the actual PDF is there to download and View

Check/Inspection Date	Name	Registration	Asset ID	Job Ref	User	Duration	Details	Select
24/02/2021 17:23:10	Para-Van Daily Check 0218	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	3 min, 57 sec	View	<input type="checkbox"/>
24/02/2021 14:06:36	Para-Van Daily Check 0218	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	4 min, 44 sec	View	<input type="checkbox"/>
24/02/2021 12:11:15	Para-Van Daily Check 0218	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	3 min, 18 sec	View	<input type="checkbox"/>
22/02/2021 10:10:53	Para-Van Daily Check 0218	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	3 min, 36 sec	View	<input type="checkbox"/>
18/02/2021 12:53:38	Para-Van Daily Check 0218	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	2 min, 16 sec	View	<input type="checkbox"/>
18/02/2021 14:20:18	Para-Van Daily Check 0218	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	4 min, 57 sec	View	<input type="checkbox"/>
18/02/2021 10:12:38	Para-Van Daily Check 0218	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	3 min, 47 sec	View	<input type="checkbox"/>
17/02/2021 13:56:42	Para-Defect During Service	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	1 min, 05 sec	View	<input type="checkbox"/>
17/02/2021 11:53:52	Para-Defect During Service	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	51 sec	View	<input type="checkbox"/>
17/02/2021 10:10:29	Para-Van Daily Check 0218	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	9 min, 19 sec	View	<input type="checkbox"/>
16/02/2021 09:00:06	CS-DVSA HDV LCV PHE 19218	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	Manual	View	<input type="checkbox"/>
08/02/2021 14:40:53	Para-Defect During Service	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	41 sec	View	<input type="checkbox"/>
04/02/2021 11:28:53	Para-Defect During Service	CSVAN (Paragus M18)	CheckedSafe Van	N/A	GaryPara (Paragus M18)	2 min, 52 sec	View	<input type="checkbox"/>

5g. Wildcard Search

The final area in this section is wildcard search you can search as per the screen shot below using a key word and this will pull out any data within the system using that word, looking at the report below we have used Windscreen as a key word and filtered by User/Vehicle and Depot and you can filter by all/any/none of those, a handy report to look at issues by type.

Inspection Date	View Check	Registration / Depot	User / Depot	Wildcard
24/02/2021 10:11 (8 hours ago)	Para-Van Daily Check 0218	CSVAN (Paragus M18)	GaryPara (Paragus M18)	Windscreen docs attached
22/02/2021 10:10 (2 days ago)	Para-Van Daily Check 0218	CSVAN (Paragus M18)	GaryPara (Paragus M18)	Windscreen docs
18/02/2021 13:12 (5 days ago)	Para-Van Daily Check 0218	CSVAN (Paragus M18)	GaryPara (Paragus M18)	Windscreen doc repaired docs
03/02/2021 12:54 (2 weeks ago)	Para-Van Daily Check 0218	CSVAN (Paragus M18)	GaryPara (Paragus M18)	Windscreen/Glazing Fail Fixed windscreen and docs attached
28/01/2021 09:15 (2 weeks ago)	Para-Van Daily Check 0218	CSVAN (Paragus M18)	GaryPara (Paragus M18)	Windscreen/Glazing Fail Windscreen job card and warranty Windscreen/Glazing Fail Windscreen fixed all ok and docs attached Windscreen/Glazing Fail Windscreen cracked nearside corner

5h. Creating/Editing Templates

This section you will learn how to create and edit your own templates (NOTE: Any edits/creations are your responsibility we will advise and point in the right direction but intimately if created/edited by you the client then the responsibilities lies with you)

To allow you to undertake this task you must first update Roles and Permissions to includes Edit/Create check – you may wish to create a unique role so that not all your “Managers” have such access.

To access the page go to Check and Inspections and Click Edit Check Templates

Here you can:

- Search for a template to Edit
- Pick from the list shown

- Create your own from scratch

Search for template name if required

Create new template from scratch

Once searched or just click from the list (hyper linked to the actual template)

Left hand Menu Checks/Inspections Click Edit Check Templates

PAGE 1 - Edit Template Page
 On this opening page you can:
 Create a new Check
 Search for an existing check
 Click on the template from the list (in blue)

Create New Check Template

Click the button "Create New Check" you will see the screen below

Give your Check a name ideally begin with your company name or initial i.e CheckedSafe would be "CS-Van Check"

Do you want to have a timer on the check, if so you can enter min/max times

Once done press Save Changes

You can now start to create your check

Click "Add New Page" and your off

Add New Page

Self explanatory below with the red notes to guide you

Once you have created your question you then need to choose how to answer it on the app the screen shot below shows you all the options you have to do this – **NOTE: DO NOT USE OPTIONAL for questions with the pass/fail scenario as you will not get the notification they must be Mandatory or Enforced**

Adding additional questions

Page 1 (Disable Page)

Minimum Page Time, in seconds
(Displays on the App minimum time this page should be completed in)

Enforce Page Time
(If ticked, Operator can't move to next page until specified time above has elapsed)

Check Description

+ New Question

Add New Question?

To Add a new question type the question in here then choose as previously once your ready then click +Add Question that will move the question up into the page your working on - REMEMBER roughly 5 or 6 questions per page on a phone 10 on tablet depending on length of question.

Free Format Optional Add Question

Check Type: Pass,Fail,NA Optionality: Mandatory Advanced Options: [Icons]

+ Add New Page **Save Changes**

Page 1 (Disable Page)

Minimum Page Time, in seconds
(Displays on the App minimum time this page should be completed in)

Enforce Page Time
(If ticked, Operator can't move to next page until specified time above has elapsed)

Check Description

+ New Question

+ To Add a new question type the question in here then choose as previously once your ready then click +Add Question that will move the question up into the page your working on - REMEMBER roughly 5 or 6 questions per page on a phone 10 on tablet depending on length of question.

Add New Question?

Enter Question Name

Free Format Optional Add Question

Check Type: Pass,Fail,NA Optionality: Mandatory Advanced Options: [Icons]

+ Add New Page **Save Changes**

Check Type	Optionality	Advanced Options
Free Format	Optional	[Icons]
<p>Identify how you wish to use the question</p> <p>Optional A value may be entered, or not</p> <p>Mandatory A defect is raised if no value entered</p> <p>Enforced Operator can't advance until a value entered</p>		

TIPS:

- For a phone generally have 6 questions per page anymore and the user has to scroll and it can become annoying
- Information only ? – add the “question” and in check type use Help and Optionality use Optional that then provides you with a “Help” question great for page headers for sectionalising your template
- Adding a new Page simply tick add new page and carry on as above

Adding a new page simply tick “+ Add New Page” bottom left and carry on.

Once completed on the back office click save then check its assigned to the right vehicles/users – give it a test before telling your colleagues to use it and away you go.

If you get stuck email support@checkedsafe.com and we will be happy to help you out

Editing Existing Check Template

If you wish to edit an existing template all you need to do is search for the template on the back office or pick from the list loaded once you access the Edit check templates area.

Then you can edit as you see fit using the same processes in creating the templates but also all the edit options below in the screenshot

Adding a PDF to Sign off (you can only add ONE per template)

6. Notifications

This section is a summary section of any notifications set up in the system against users “Upload User Documents” in the user profile or Vehicle Documents in the Vehicle folder

User Documents

Upload User Document

Document Type:

Document Notes:

Start Date (if applicable):

Expiration Date (if applicable):

Upload User Document (max 200 MB) No file chosen

User Documents

Document Type	Filename	Notes	Start Date	Expiration Date	Uploaded On	Notification	Actions
Dvr License Check Gary	2017125_131321.jpg	License Check Gary	0405/2018		05/05/2018 09:05:09	Active Next: 29/01/2021	Download Cancel Notification Delete Assign To App

View User Notifications

User Login:

Document Name:

Document Notes:

Document Type:

User Login	Document Name	Document Type	Next Notification Date	Is Recurring Notification?	Notes	View Document	View Notification
DoranPava	HSE New Job Role Training and Induction.pdf	Manual Handling Training	02/06/2021	Every 6 Months	Uploaded by DUN	View	View
DoranPava	2017125_131321.jpg	Dvr License Check Gary	04/05/2018	Never	License Check Gary	View	View
DoranPava	Digital Daily Checks Training Consent Record.docx	Training Record	01/02/2021	Every 6 Months	Uploaded by DUN	View	View
Captain America	Digital Daily Checks Training Consent Record.docx	Training	03/01/2021	Every 6 Months	Up	View	View
Captain America	HSE Covid-19 Homecare Update 2 April 2020.pdf	First Aid Certificate	01/10/2020	Every 3 Years	Uploaded by DUN	View	View
KinkyPava	Digital Daily Checks Training Consent Record.docx	Driver Training Record	27/03/2021	Every 3 Months	Uploaded by DUN	View	View
Mid Mouse	HSE New Job Role Training and Induction.pdf	Manual Handling Training	02/06/2021	Every 6 Months	Uploaded by DUN	View	View
DoranPava	Driving License example.jpg	Driving License	19/08/2021	Every 6 Months	Driving License SS	View	View
JasonPava	FORS Car.jpg	FORS Car	21/06/2021	Every Year	FORS Car	View	View

Showing 9 of 9 of 9 entries

Upload Vehicle Document

Document Type:

Document Notes:

Start Date (if applicable):

Expiration Date (if applicable):

Upload Vehicle Document (max 200 MB) No file chosen

Vehicle Documents

Document Type	Filename	Notes	Start Date	Expiration Date	Uploaded On	Notification	Actions
MOT reminder	MOT Failure Example.jpg	Completed by Dun	08/10/2020		08/10/2020 13:45:38	Active Next: 13/10/2021	Download Cancel Notification Delete Document
MOT reminder	MOT Failure Example.jpg	Uploaded by Dun	24/09/2020		24/09/2020 18:35:35	Not active	Download Create Notification Delete Document
Insurance Cover	Corporate membership - change not pursued despite double death ... Tax and registration fees.pdf	Uploaded by DUN	24/09/2020		23/09/2020 10:47:42	Active Next: 10/10/2021	Download Cancel Notification Delete Document

Check/Inspection Documents

Added By	Added On	Notes	Document	View Check
DoranPava	01/10/2020 10:57:58	repair invoice attached from auto glass	Sample Repair Invoice 1.jpg	View Check

View Vehicle Notifications

Vehicle Registration:

Document Name:

Document Notes:

Document Type:

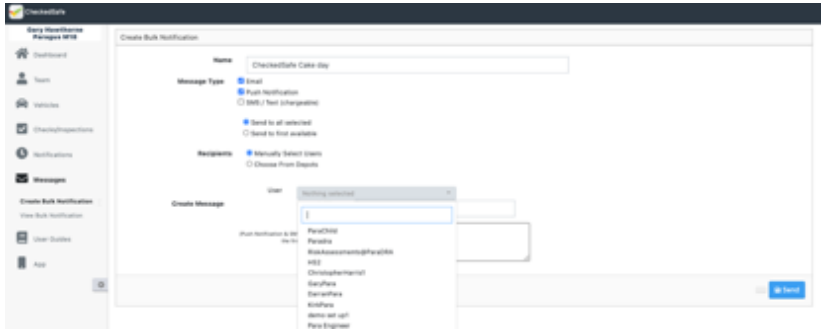
Vehicle Registration	Document Name	Document Type	Next Notification Date	Is Recurring Notification?	Notes	View Document	View Notification
CB0AK	MOT fail certificate-dangerous-critical.jpg	MOT certificate	27/02/2021	Every Year	Uploaded by DUN	View	View
CB0DV	MOT fail certificate-dangerous-critical.jpg	MOT certificate reminder	06/02/2022	Every Year	Uploaded by DUN	View	View
CB0CV	MOT fail certificate-dangerous-critical.jpg	MOT certificate reminder	06/03/2022	Every Year	Uploaded by DUN	View	View
EE1FPF	Sample Brake Test Result.jpg	Brake Roller Test	24/02/2021	Every 4 Weeks	uploaded by CheckedSafe	View	View
DR437S	FL7a Letter of Endorsement.pdf	Fork Lift Truck Policy	18/04/2021	Every 12 Weeks	uploaded by CheckedSafe	View	View
EE1FPF	Brakes.jpg	MOT Certificate and Reminder	25/10/2022	Every Year		View	View
ND8THGATE	MOT Failure Example.jpg	MOT Reminder	28/10/2021	Every Year	Uploaded by DUN	View	View
CB0AK	BRAKE ROLLER TEST EXAMPLE OF A BAD FAILURE.jpg	Brake Roller Test	18/12/2021	Every Year	Uploaded by DUN	View	View
CB0DV	Sample PHM Template Blank.pdf	MOT reminder	18/10/2021	Every Year	Uploaded by DUN	View	View
CEMENT	Sample PHM Template Blank.pdf	Tarcho Calibration Certificate	06/10/2021	Every Year	Uploaded by DUN	View	View

Showing 9 of 9 of 9 entries

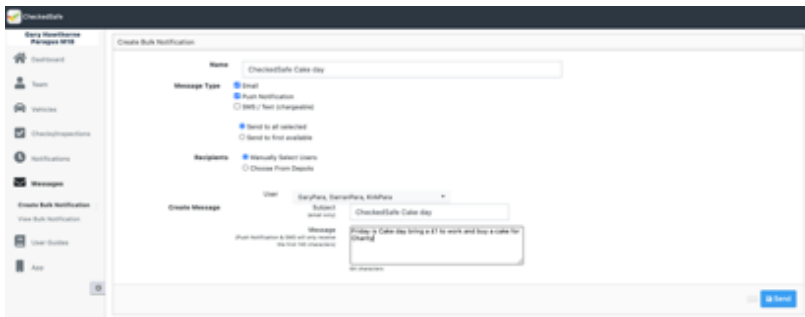
All notifications also appear on the Weekly summary email and look up as previously discussed

7. Messages

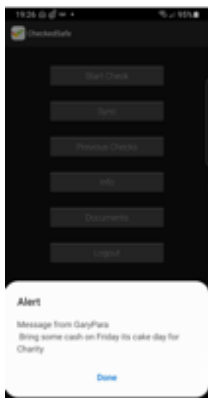
This section allows you to create group messages that are pushed out via email push (App) and text (chargeable) and are tracked so you can see who has read them.



Give the message title, pick how to send it (SMS is chargeable), pick who to send to, enter message – at this stage you can also schedule as to when the message can be sent great for planning early messages etc.



Once sent it appears on the App and the user has to click done

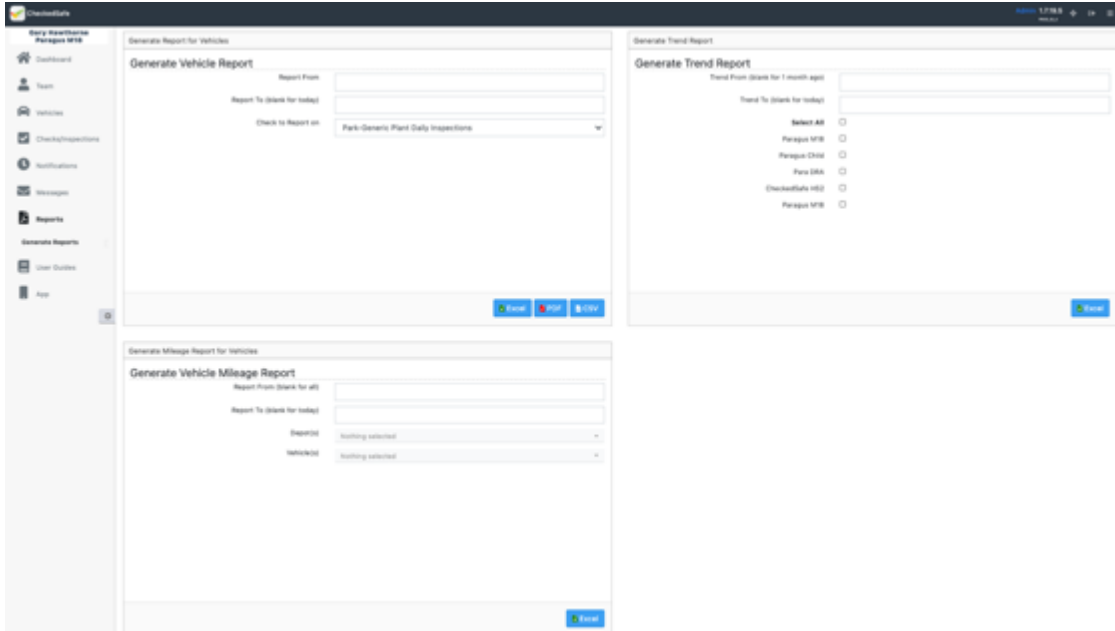


“Sorry Boss what message?” the view message show who has received the message with a green sent (if they are not logged on it will show a fail)

Name	Created By	To	Via	Status	Message
CheckedSafe Cater Day	GaryPars on 24/05/2021 10:28 (Paragus MTS)	EMSL (email: emsl.hazards@checkedsafe.com)	Push	SENT on 24/05/2021 10:28	Cater on Friday - Bring some cash on Friday its cater day for Charity
CheckedSafe Cater Day	GaryPars on 24/05/2021 10:28 (Paragus MTS)	EMSL (Paragus MTS)	Push	FAIL on 24/05/2021 10:28 (Reason: No 3234 Tokens)	Cater on Friday - Bring some cash on Friday its cater day for Charity
CheckedSafe Cater Day	GaryPars on 24/05/2021 10:28 (Paragus MTS)	CheckedSafe (Paragus MTS)	Push	SENT on 24/05/2021 10:28	Cater on Friday - Bring some cash on Friday its cater day for Charity
CheckedSafe Cater Day	GaryPars on 24/05/2021 10:28 (Paragus MTS)	EMSL (email: emsl.hazards@checkedsafe.com)	Push	SENT on 24/05/2021 10:28	Cater on Friday - Bring some cash on Friday its cater day for Charity
CheckedSafe Cater Day	GaryPars on 24/05/2021 10:28 (Paragus MTS)	EMSL (email: gary.hazards@checkedsafe.com)	Push	SENT on 24/05/2021 10:28	Cater on Friday - Bring some cash on Friday its cater day for Charity
CheckedSafe Cater Day	GaryPars on 24/05/2021 10:28 (Paragus MTS)	CheckedSafe (Paragus MTS)	Push	SENT on 24/05/2021 10:28	Cater on Friday - Bring some cash on Friday its cater day for Charity

8. Reports – Generate report

Each section you can generate reports from in PDF or the raw Excel data, this section you can create group reports-based template specific, by mileage and a great report is the trend report this is an excel report gathering data from all aspects of the app and back office. Great for looking at trends of defects or NO defects.



Trend Report

As you can see below a host of data all in excel so you can use this data to produce a set of in-house stats if required

		Total Checks	Total Defects Raised	% Checks With Defect	Average Number Defects	Cleaned Defects	Active Defects	Serviceable Defects	Average Time Per Check	% Checks Under 3 Minutes
Paragus M18	DVSA Minibus Daily Check	2	2	100.00	1.00	2	0	0	0:00:05.03	0
	Fresh Linen Bump card	1	1	100.00	1.00	1	0	0	0:00:02.30	100.00
	CS-DVSA HGV-LGV PM 191218	6	4	66.67	0.67	2	2	0	0:00:00.00	100.00
	CS-Van Daily Check 201218	3	4	133.33	1.33	4	0	0	0:00:03.02	33.33
	CS-Truck Only 020119	4	8	200.00	2.00	8	0	0	0:00:03.45	25.00
	CS-PCV-Daily Walkaround Check 2012	1	2	200.00	2.00	2	0	0	0:00:03.18	0
	Para-Defect During Service	8	7	87.5	0.875	7	0	0	0:00:01.08	100
	Para-Van Daily Check 0218	14	27	192.86	1.9286	27	5	0	0:00:04.02	14
	KPS Car and Van (Optional Trailer) 08	1	0	0	0	0	0	0	0:00:05.43	0
	PAR Truck & Trailer (Non ADR)	1	0	0	0	0	0	0	0:00:00.31	100
Common Faults										
Paragus M18	Item	Count								
	CS-DVSA HGV-LGV PM 191218	11 - Trailer drawing eye hook/With safe Cab Height Indicator								
		Steering								
	CS-PCV-Daily Walkaround Check 2012	Horn								
		Windscreen/Glazing								
	CS-Truck Only 020119	Cab Controls (inc. Height Indicator)								
		Horn								
		Windscreen/Glazing								
	CS-Van Daily Check 201218	Horn								
		Windscreen/Glazing								
	DVSA Minibus Daily Check	Lights/Interior Lights								
		Windscreen/Glazing/Mirror								
	Para-Defect During Service	Photos								
		Photos								
Operator Summary										
	Operator Name	Number Of Checks	Number Of Defects	Number of Nil Defects	Number Checks Under 3	Number Checks Over 10 Minutes				
Paragus M18	Damon/Para	25	26	8	13	0				
	Gary/Para	16	31	1	7	0				
	Jake/Para	1	0	1	1	0				
Filter Summary										
	Filter Name	Defects Made Serviceable	Defects Cleared							
Paragus M18	Gary/Para	0	26							
	Damon/Para	0	30							
Asset Summary										
Paragus M18	% With Defects	2.631578947	Avg Time From Raised to Clear	0:18:00:00:18	Avg Time From Raised to Serviceable	0:12:53:18				

Mileage Reports

The screenshot shows the CheckedSafe dashboard with a sidebar on the left containing navigation options like Dashboard, Train, Vehicle, Checklists/Reports, Notifications, Messages, Reports, Generate Reports, Admin, User Guides, and App. The main area contains four report generation panels:

- Generate Report for Vehicles:** Includes fields for 'Report From', 'Report To (blank for today)', and a dropdown for 'Check to Report on' (set to 'MEBPDaily Check'). Buttons for 'Excel', 'PDF', and 'CSV' are at the bottom.
- Generate Trend Report:** Includes 'Trend From (blank for 1 month ago)' and 'Trend To (blank for today)'. A 'Select All' checkbox is checked. Other checkboxes for 'CHECKEDSAFE', 'test', 'Phil Lloyd (CheckedSafe)', 'CheckedSafe Team', 'Neil Simms - Test Company', and 'Neil Simms - Test Company CHECKEDSAFE' are present. A 'Save' button is at the bottom.
- Generate Mileage Report for Vehicles:** (Highlighted with a yellow oval) Includes 'Report From (blank for all)', 'Report To (blank for today)', 'Depot(s)' (set to 'Nothing selected'), and 'Vehicle(s)' (set to 'Nothing selected'). Buttons for 'Excel', 'PDF', and 'CSV' are at the bottom.
- Daily Check Report:** Includes 'Report Type' (User Centre/Vehicle Centre), 'Report From (blank for current month)', 'Report To (blank for current month)', 'Depot(s)', and 'Check(s)'. All dropdowns are set to 'Nothing selected'. A 'Save' button is at the bottom.

Fill in dates from and to (blank if running to the current day) pick depot and pick assets to report on
Click Excel to run then download to filter and use as you see fit

This close-up shows the 'Generate Mileage Report for Vehicles' panel with the following filled-in fields:

- Report From (blank for all): 01/04/2021
- Report To (blank for today): 30/04/2021
- Depot(s): CHECKEDSAFE
- Vehicle(s): bc0Mks4, 9z6hr1M, AAT666, AAT716, AAT726

The 'Excel' button at the bottom is highlighted with a red oval. Below it, the text 'File Ready, click here to download.' is visible.

9. Scheduling

To create a schedule – the scheduling system reads existing data from the system unlike a traditional wall planner of ticking and sticky dots the electronic version reads the actual data and reacts/plans accordingly with the data inputted.

There are 9 steps to the schedule:

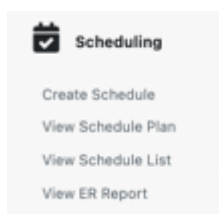
Before you start scheduling you need to ensure you have the correct template to undertake the check required against that template or to drag in the paper document and tag to the same template.

- 1. Left hand menu click schedule; create schedule this will load a page as above with no data
- 2. Enter a schedule name that you want to use
- 3. Enter a start date Note: the start date should be after the vehicle start date and after you have started using the system
- 4. Choose if the schedule should be daily or periodic – you can set up as many as you want and have both if you wish but to create them you need to do one at a time
- 5. Choose either weekly or by hours/miles
- 6. Enter the depot from the dropdown menu that this schedule is applicable to
- 7. Choose from the dropdown the template that will be used to undertake the checks or upload to
- 8. Choose from the dropdown the assets that the schedule is scheduling
- 9. Submit

Once the schedule is set up any data in the system that is “tagged” to the schedule will pull into the schedule read view.

Note: for Hours/Mileage schedules they all default to weekly on the set up so if you have tagged at 1000 mile/1000 hour inspection/service it will also look at the average hours/mileage and plot accordingly as well as notifying you

To view the schedule, you can do this by clicking View Schedule plan under Scheduling and if you wish to see the individual assets listed in the schedules again by clicking the view Schedule list it will bring up the list to view.



The following screen shots provides more information on schedules

To view the schedule after clicking View Schedule plan

Use dropdown to pick the schedule

Use dropdown to pick the vehicles to view (or click all as it will only drag in those vehicles you have set up in the schedule)

Pick the start date

Once you have picked the start date press go – you can run this off as a printout so you can still have the traditional wall planner.

Note: The schedules you set up on day one will look odd as they will all be the same periods, but you will soon see as data is pulled into the schedule electronically the periods will start to auto calculate forward and once you have your first data point loaded to can then plan to the day your next inspection, once completed again it will auto calculate forward



Once your schedules are now on view you can click the dark blue vehicle reg and this takes you to the vehicle folder

Or tick the lighter blue schedule name and this takes you to the set up for that schedule.

Freeze Header & Column		Week 5 (01/02/21)							Week 6 (08/02/21)							Week 7
Registration	Schedule	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M
BB111ED	1000 Mile Service															
CSVAN	1000 Mile Service															
PN68KRV	1000 Mile Service															

Once your back in the set up you can add/remove assets without the need to re-create the schedule

Assets (Select All)

BB111ED, PN68KRV, CSVAN

BB111ED

BL64EE

SK72QJ

PR68UE

PARA

KT18UFB

paracar

sh99mer

OUE7OVE

RB2345

BB11

PN68KRV

DRASITE

VMBVVNT

If you want to delete the schedule just delete here – remember no data will be lost as its only reading data from the system

Gary Hawthorne
Paragus WTB

Dashboard

Team

Vehicles

Checks/Inspections

Notifications

GPS & GeoFence

Messages

Reports

Live Worker

Scheduling

Create Schedule

View Schedule Plan

View Schedule List

View ER Report

User Guides

Create Schedule

Name: 1000 Mile Service

Start Date: 02/1/2020

End Date (leave blank for ending):

Earned Recognition: Use for ER Reporting?

Schedule Type: Pre-Journey / Daily Check Periodic (PM/AMC/Brake etc.)

Weeks: Every Week

or, Mileage: Every 1,000 Miles

Depots (Select All): Paragus Child, Para DRA, Paragus WTB

Checks (Select All): LFS Service Record

Assets (Select All): BB111ED, PN68KRV, CSVAN

Delete Clear Submit