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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Document	User Guide – Back Office
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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 its will take you to that page and section for guidance, every thing is explianed in each section, if you have any problems please contact support@checkedsafe.com

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 make you simply dthate task again with the correct information this is a postive approach as it indicates a fully compliant process

2. Dashboard View

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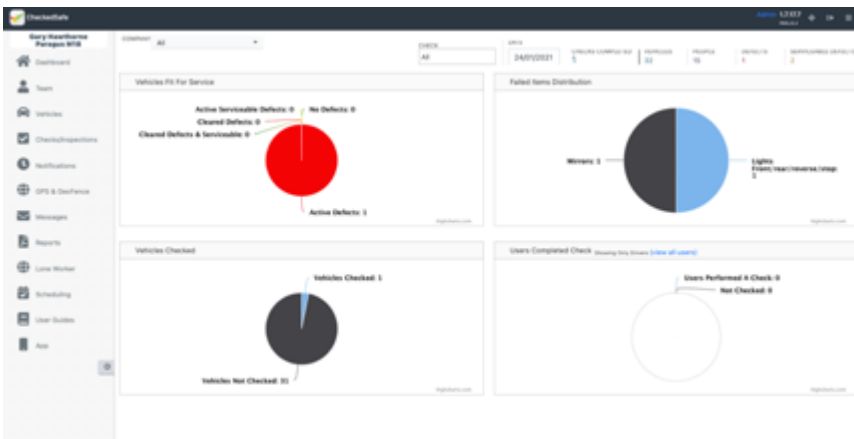
3. View Team
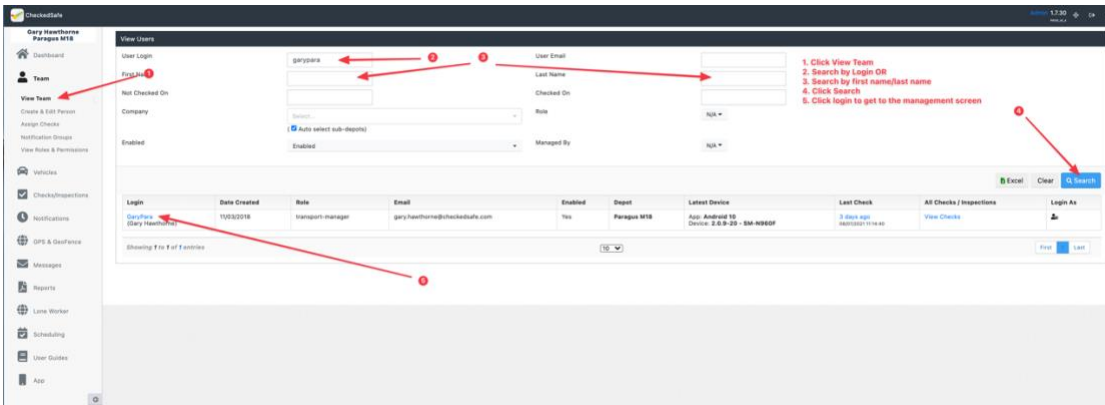
By Clicking View team you then get a menu page to search by login, name, email etc. Type in any of these sections and press search, the team member will then appear, and you can click the hyperlinks to view the profile or view that persons last check or all checks.

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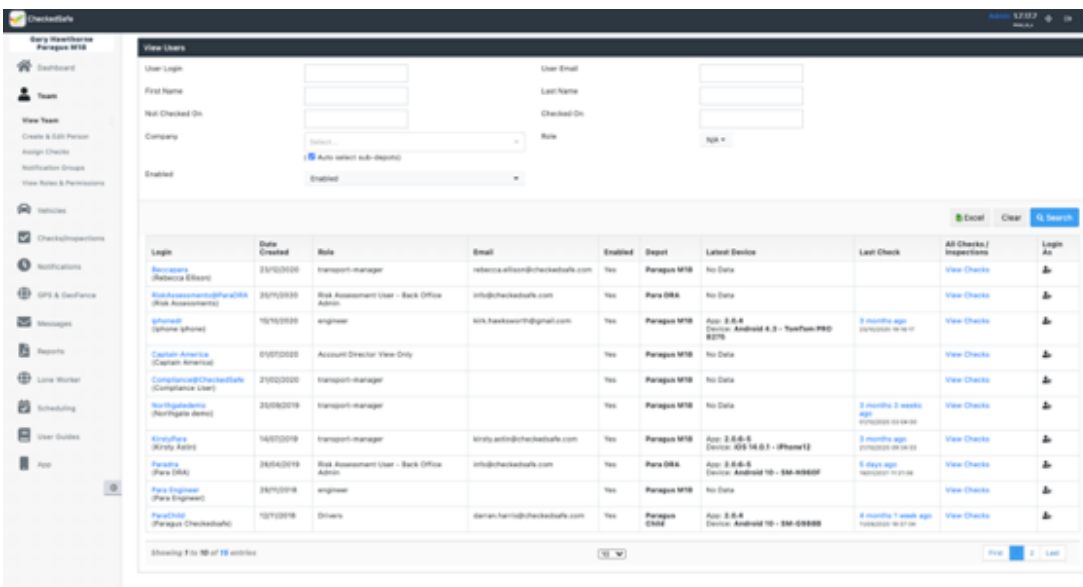
In this section, once you have the whole team on view you can click any of the "blue" hyperlinks which will take you to whichever section you wish to have a look at, this page also provides information on:

- **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

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	Park-Generic Plant Daily Inspections ▾

[Excel] [PDF]

Email Summaries

Daily

Receive Daily Email	☑
Skip Weekend?	☐
Receive Daily Email On	☐ Previous Day ● Current Day
Time to receive email	08:40 ▾

Weekly

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

Depots

Depots	Paragus Child, Paragus M18 ▾

[Submit]

Lone Worker Stationary Parameters

No User specific LoneWorker Stationary Parameters defined - Override defaults

Lone Worker Alerts

Receive Alerts When a LoneWorker...

Starts	Email ☐	Text ☐
Ends	Email ☐	Text ☐
Is Overdue	Email ☑	Text ☐
SOS	Email ☑	Text ☐
Stationary	Email ☑	Text ☐
Choose Depots	Paragus M18 ▾	

[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
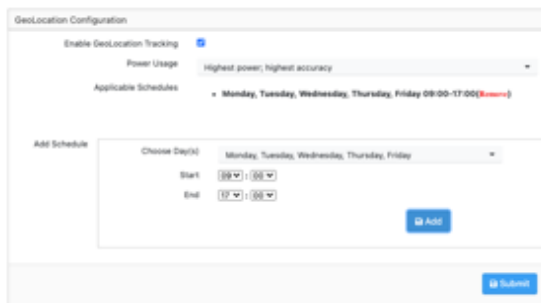
Once created you can now use the GPS and Geo Fence menus, left hand menu GPS & Geo Fence
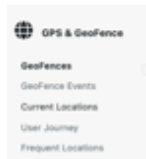
View created Geo fences or create your own this allows you to control the areas and entry/exit reports for Defects and/or Checks completed/not completed. To create new Geo Fence click Create new, draw your Geo Fence, name it and set your parameters.

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

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.
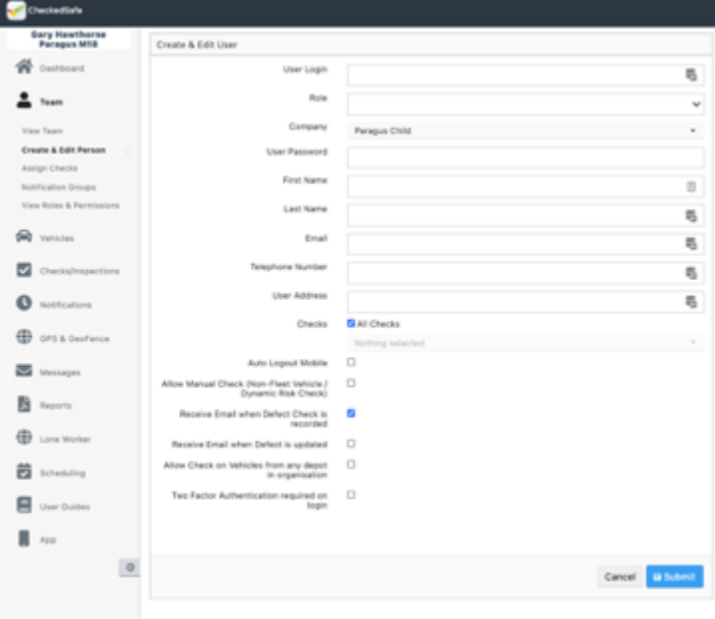
You can also look at the user's journey – the system stores ALL previous journeys so you can search by user and by date, if you hover over the journey (black arrows) you will be able to ascertain the speed.
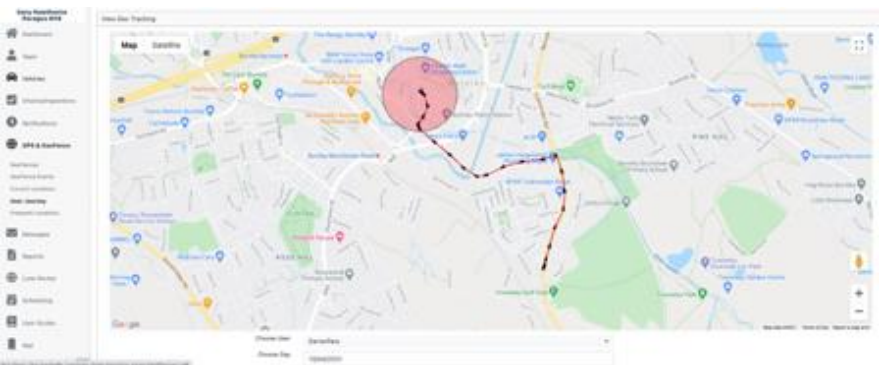
You can also see your users' frequent journeys over a period (shown below as a heat map (green/yellow/Orange etc))
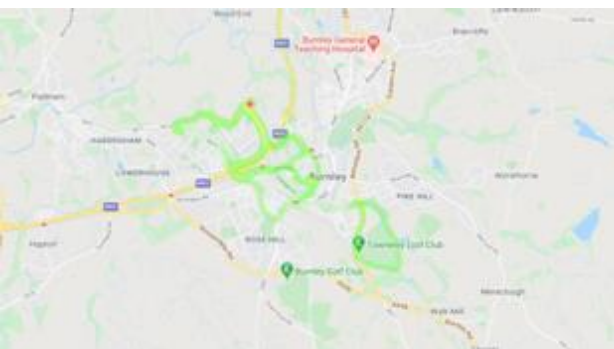
b. Create & Edit User - Adding a New User

- 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
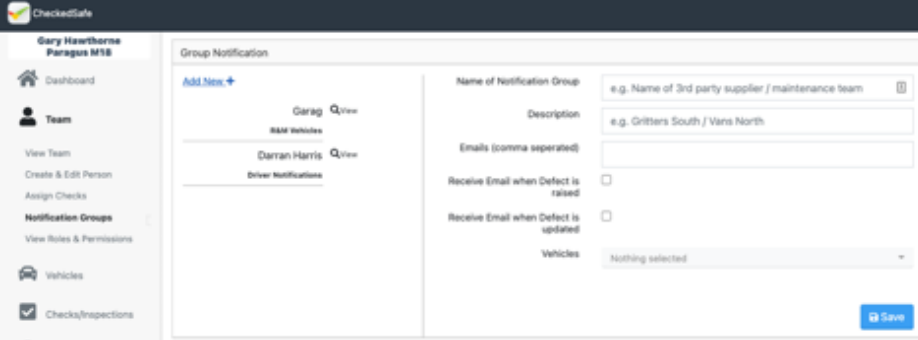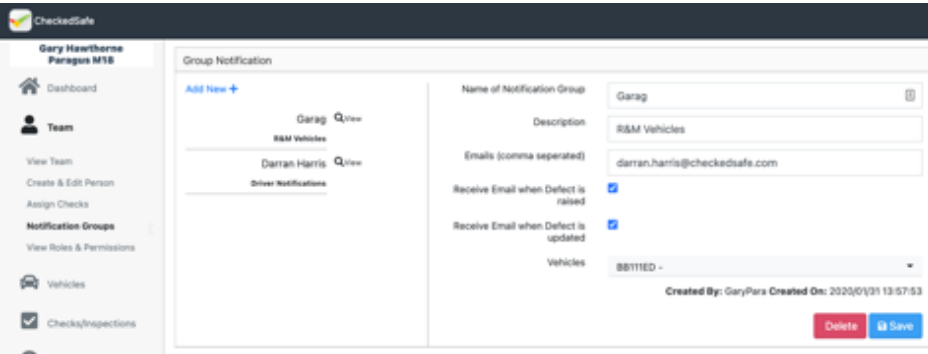
d. Group Notifications

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

Creating you 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
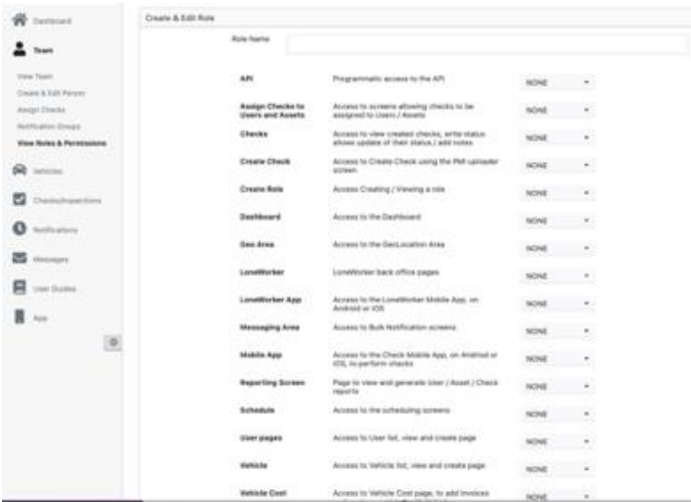
f. Adding Documents/photos/videos to user Roles

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
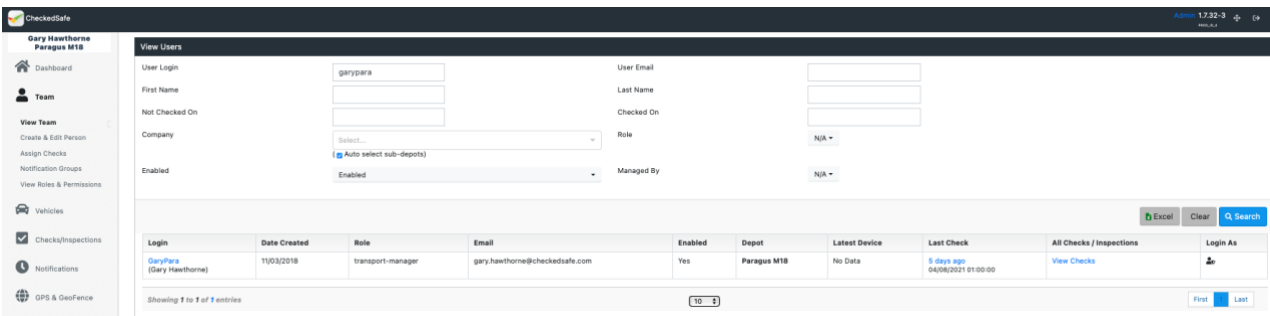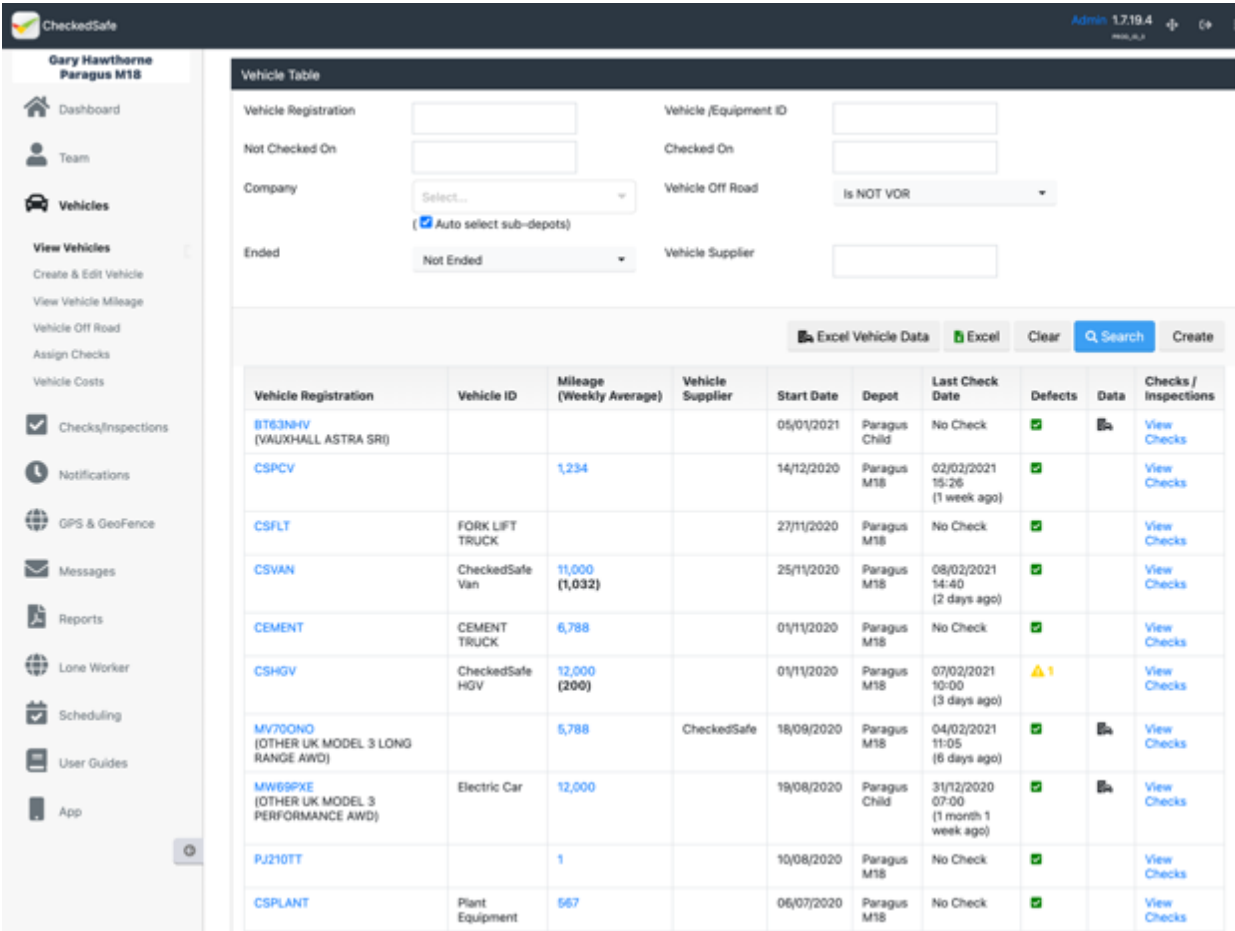
Click their login to get access to their profile, scroll down to Document uploader and follow screen shot below
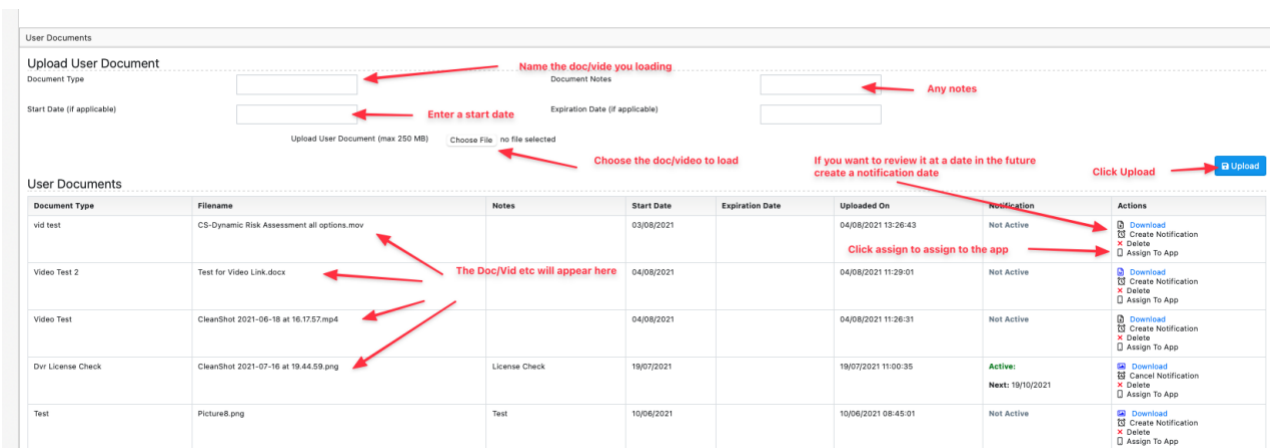
Once assigned to the app the user has full access to whatever you have loaded. To check if they have opened it click the "assign to App" in the user profile and it will tell you how many times it has been opened. You can upload Word,Excel,Png,Jpeg,PDF and Mp4 videos.

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

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

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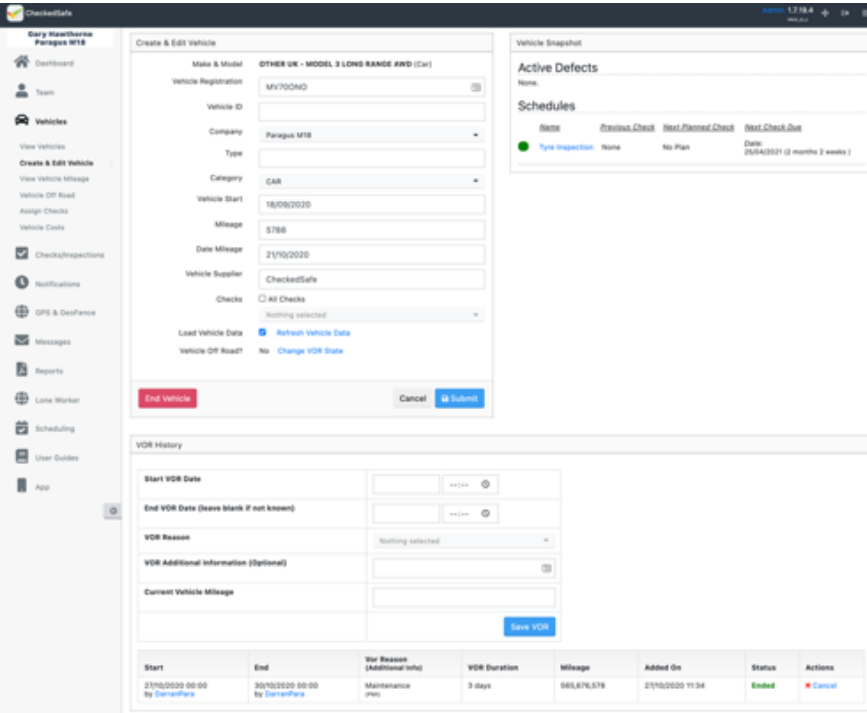
Note: If you get a message vehicle already in the system this could be in another depot if you have multisites in our system and it could be VOR or Ended, you can at this stage contact support@checkedsafe.com or if you have a Head Office administrator they can move that vehicle for you

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
- <mark>End the vehicle</mark> – 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 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

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.

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

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

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.

+ 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
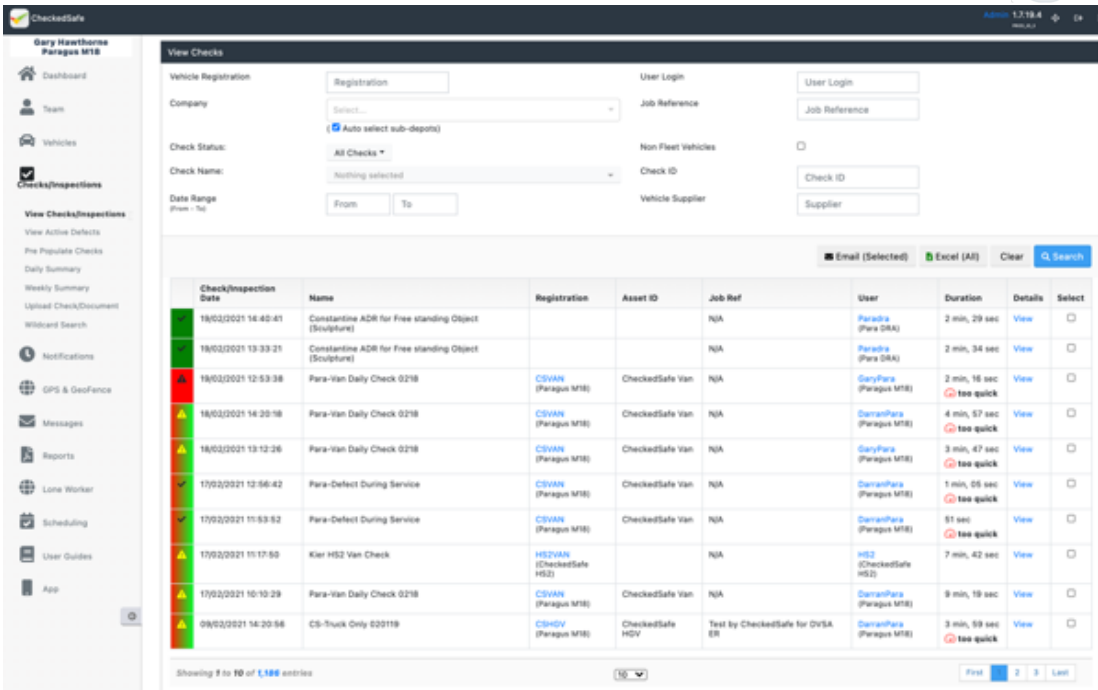
## 5.i   Viewing Checks – the full details

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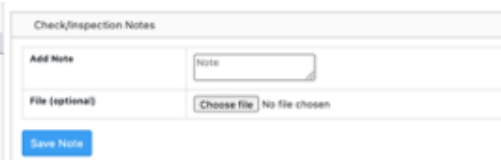
In the main body of the check, you can see full details of the questionm the answer (Value), Failure Reasons and our UPS which is the compass and elapsed time (we use the compass in the device to track movement around the asset whilst checking and also we take a time stamp on ach question.

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

The last section on this report provides information on the users 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 unessessary 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
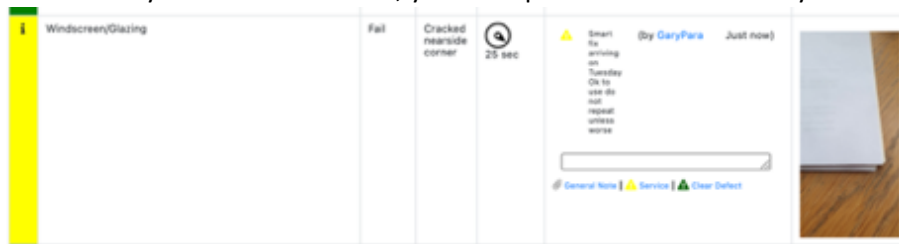
At the top of the view check area you will have seen a summary this now starts to flesh out summarising the actions taken and tagging date/time and user so you have a full trail of compliance

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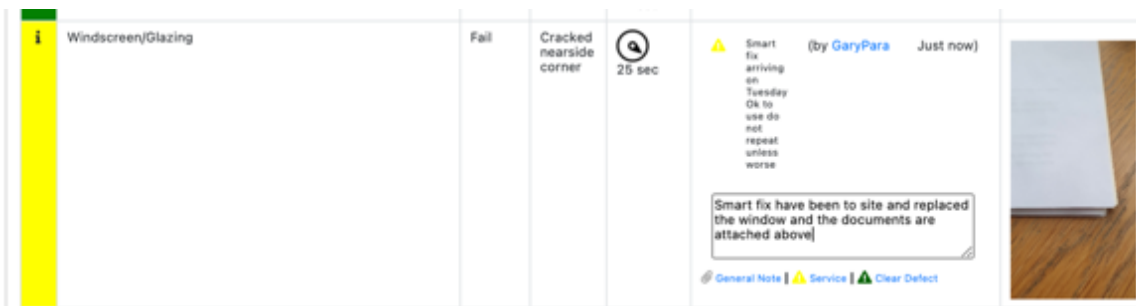
Once you have pressed Clear Defect you will now see that the defect has gone green and your notes are now in the box under the serviceable notes now with a Green triangle – again time/date and user are tagged

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

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 uplaod a reciept, job card, warranty etc.

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

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	Note
File (optional)	Choose File no file selected

Save Note

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 reapired 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

▶ I Authorise Vehicle as Safe and Legal

5.v   Send a message to the App

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

Once you press send the message will pop up on the user's device as below
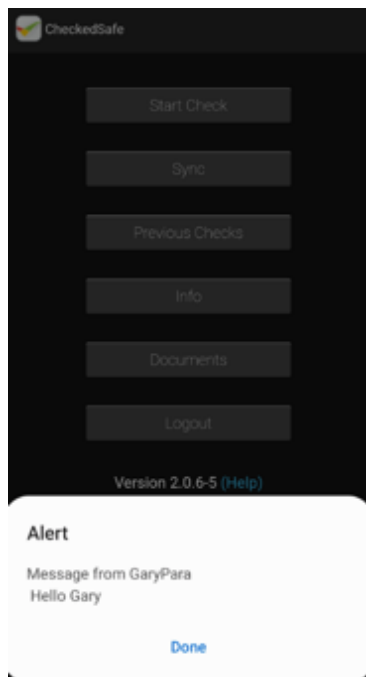
5b.   View Active Defects

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.

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.

eat this each time if they change and do it for each staff member if the data is different

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

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.

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

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

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

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.

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

Create New Check Template

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

You can now start to create your check

Click "Add New Page" and your off

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 me 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) `0`

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

Check Description	Check Type	Optionality	Advanced Options
New Question	Pass,Fail,NA ▾	Mandatory ▾	✎ ⊘

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 |

✚ 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) `0`

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

Check Description	Check Type	Optionality	Advanced Options
New Question	Pass,Fail,NA ▾	Mandatory ▾	✎ ⊘
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 New Question?

| Enter Question Name | Free Format ▾ | Optional ▾ | ✚ Add Question |

✚ Add New Page   🔖 Save Changes

Check Type	Optionality	Advanced Options
Free Format ▲	Optional ▾	✎ ⊘
Identify how you wish to use the question		

Optional A value may be entered, or not
Mandatory A defect is raised if no value entered
Enforced Operator can't advance until a value entered

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

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.
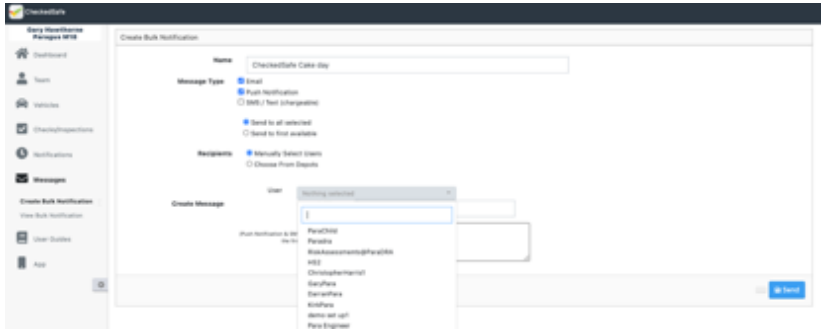
Give the message title, pick how to send it (SMS is chargeable), pick who to send to, enter message – at this stage you can also schedule as to when the message can be sent great for planning early messages etc.
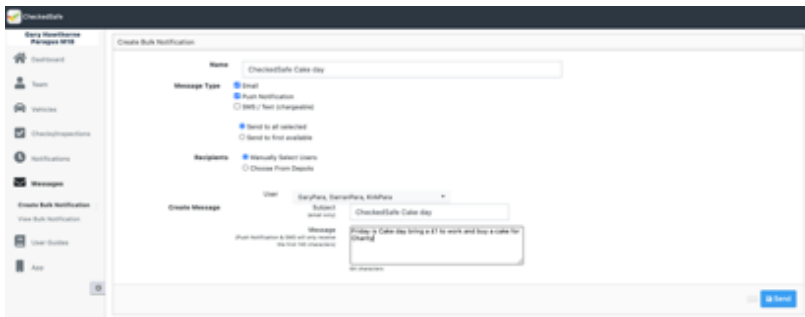
Once sent it appears on the App and the user has to click done
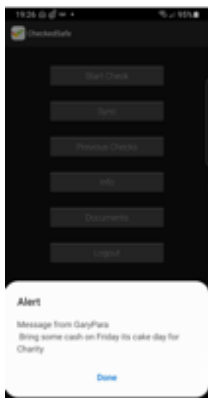
"Sorry Boss what message?" the view message show who has received the message with a green sent (if they are not logged on it will show a fail)

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.
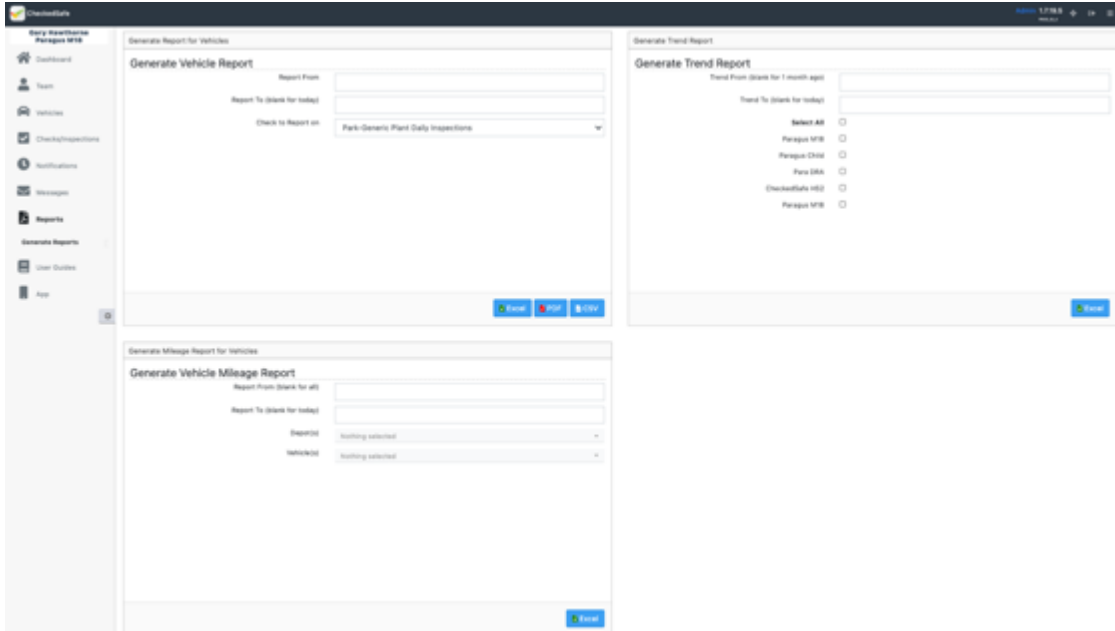
Trend Report

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

Mileage Reports

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

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 notyfing 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.
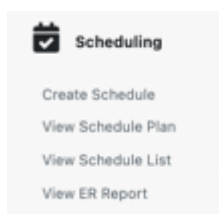
The following screen shots provides more information on schedules

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.

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

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