iFace Pre Trip Checklist User Guide

This document describes Pre Trip checklist functionalities on the iFace and how to create and report upon Pre Trip Checklists in Nextgen.

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Version:	1.0	Date:	20 June 2017

1 VERSION CONTROL

Table 1 shows the history of versions of this document.

Version	Date	Comments
1.0	20 June 2017	Initial version.

TABLE 1 - VERSION CONTROL HISTORY

2 PURPOSE OF THE PRE TRIP CHECKLIST

The iFace's Pre Trip Checklist application allows the driver to complete Vehicle and Driver pre-trip checklists on the iFace without the need for a paper copy. Drivers must complete a pre-trip checklist at minimum at the beginning of each shift, or more often if company policy dictates that.

2.1 MAIN SCREEN

The iFace application is run automatically when the device is started. The main screen is shown when the iFace is started: The layout of the home screen will vary depending on the applications that are available.
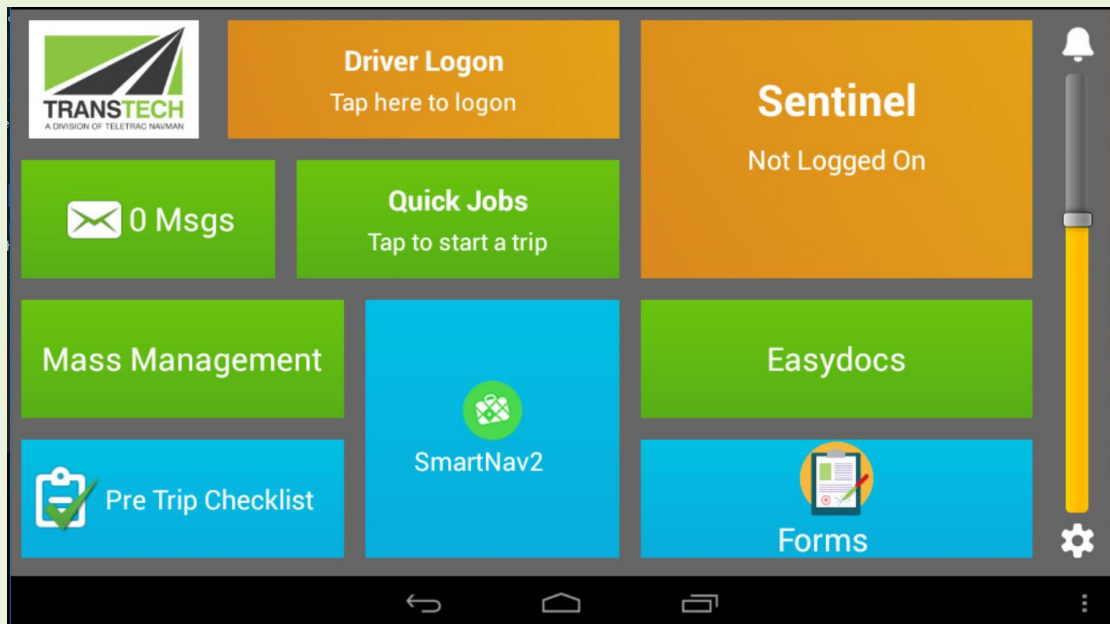

FIGURE 1 - MAIN SCREEN

2.2 PRE TRIP CHECKLIST

You must log in before you can complete a pre-trip checklist. If you select the Pre Trip Checklist application before logging in you will be redirected to the log in screen.
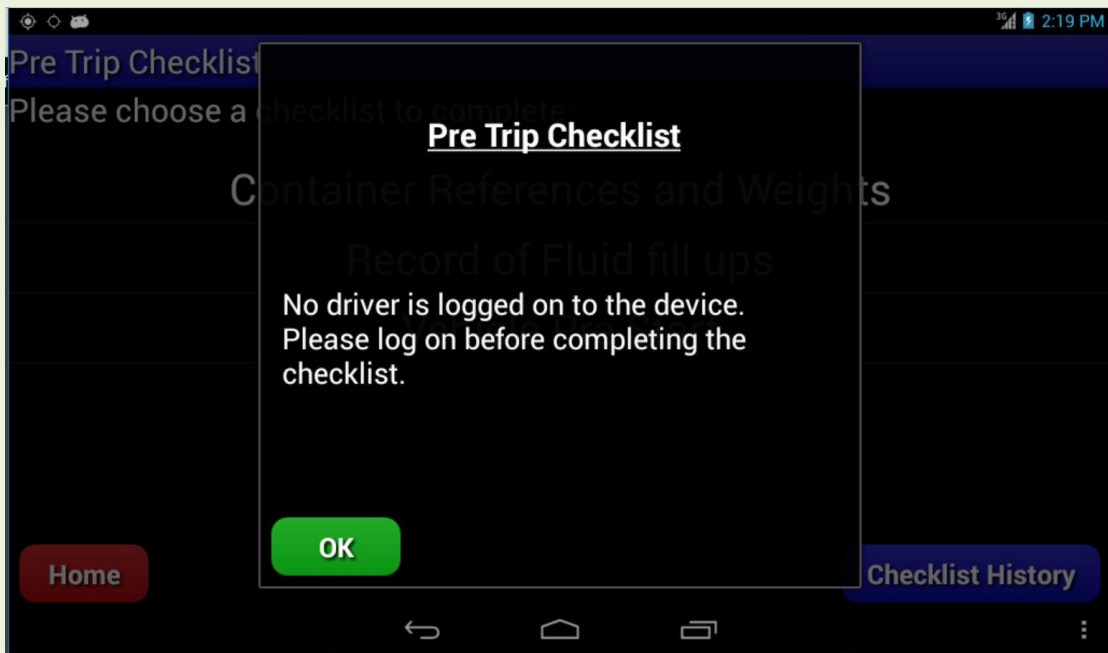

FIGURE 2 – LOG IN RE-DIRECTION SCREEN

Once you have logged on, tap to visit the pre trip checklist selection screen. You will be shown the available checklists on the iFace. These will vary depending on your companies work practices.
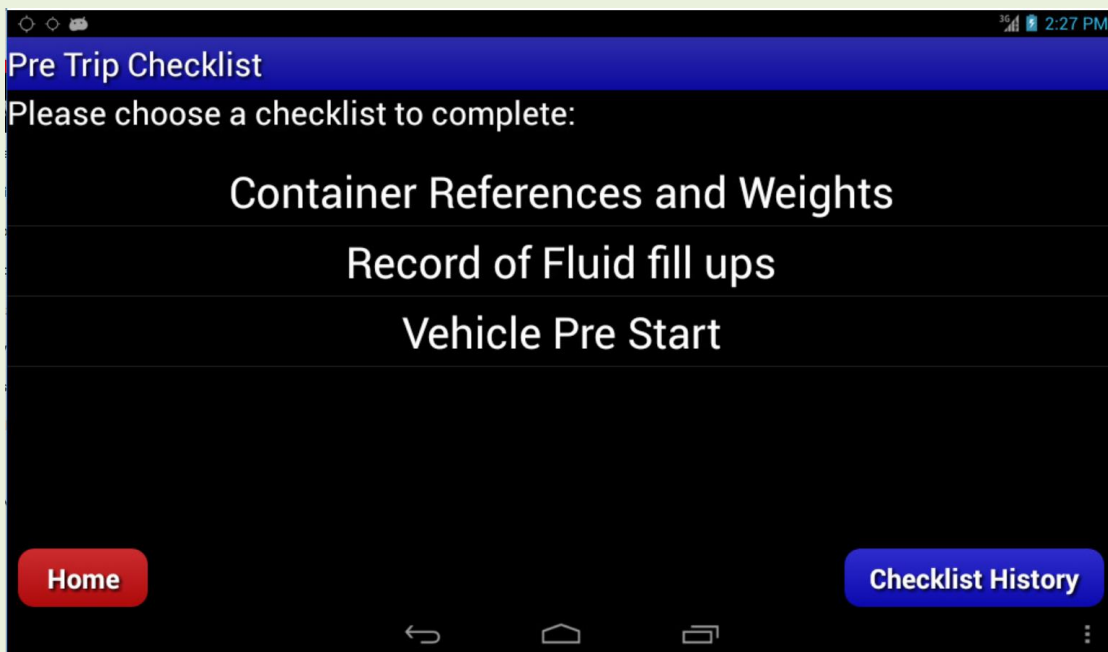

FIGURE 3 - PRE TRIP CHECKLIST HOME SCREEN

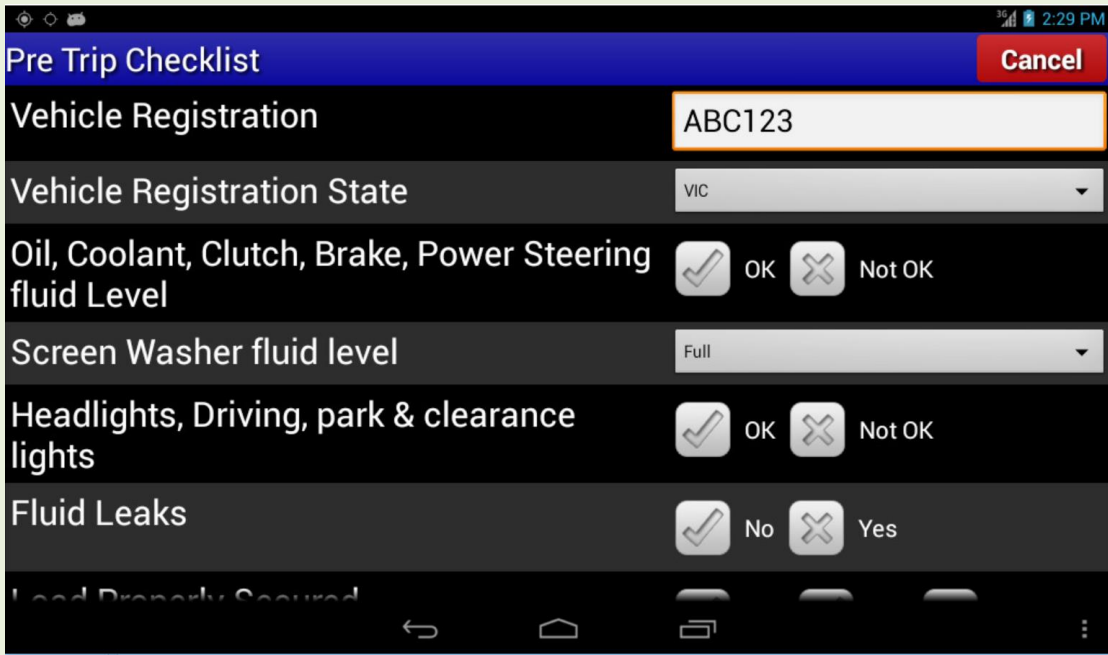Tap the name of the checklist and it will open automatically.

FIGURE 4 - EXAMPLE CHECKLIST

The Vehicle Registration is an optional checklist requirement, if it is enabled then it will be remembered from the last checklist that was completed, so if the details are correct they won't need to be entered again. To change it or add a new vehicle registration touch the screen in the white box and a keypad will appear, enter the registration details and press "Done" (bottom right hand side of the keyboard).
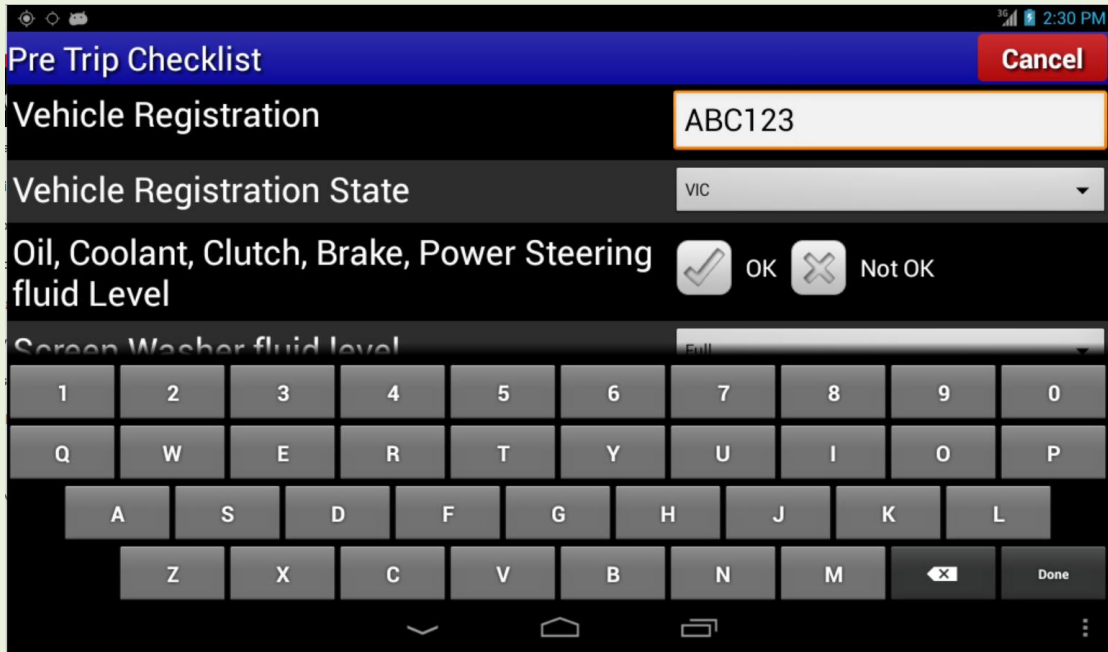

FIGURE 5 - CHECKLIST SHOWING THE ALPHA-NUMERIC KEYBOARD FOR TEXT ENTRY

Select and update the registration state if it is incorrect and then move onto the checklist.

There are a number of different question and answer types including; OK and Not OK, Yes/No/NA, select from a drop down list, numeric input and text inputs. Where a checklist item has a tick or cross answer, then a pass will show as a green tick and a failure will show as a red cross.

The action taken to complete the checklist will depend on the question types used. If the answer required is numeric, for example an odometer reading, then when you select that question a numeric keypad will appear. If the question has a Yes/No answer then select the relevant response. All questions must be answered before the checklist can be submitted. Optionally you may be asked for further information and to capture a photograph. Photographs are optional but if you are asked for more information then you must fill out the field or you will not be able to submit the checklist.
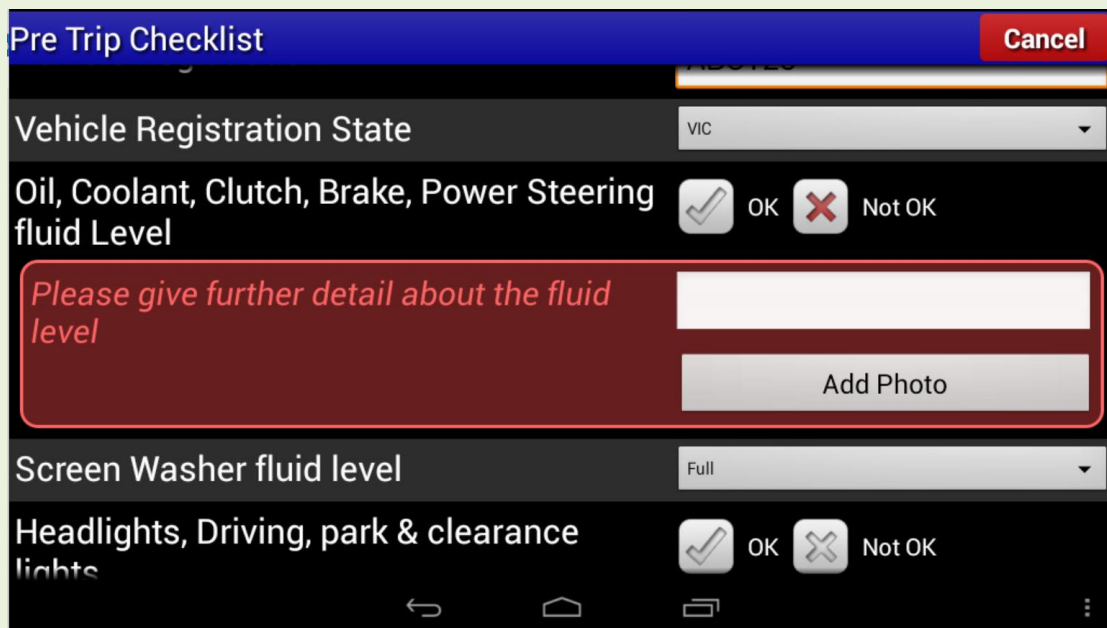

FIGURE 6 - FAILED CHECKLIST QUESTION WORKFLOW WITH PHOTO OPTION

When taking a photo, line up the iFace so the item you are photographing is displayed on the iFace screen and press the "Take Photo" button. If you are not happy with the photo you may delete it by selecting the photo in the top left of the screen. You will be asked to confirm that you want to delete the photo, if you press "Yes" then you will be able to take a new photo.

You must click "Accept" to save the photo and return to the checklist.

FIGURE 7 - EXAMPLE OF HOW THE SCREEN WOULD APPEAR WHEN PHOTOGRAPHING A BROKEN INDICATOR

Some checklists will also ask you for further information at the bottom of the checklist. Again the checklist cannot be submitted until all of the questions have been completed.

When the checklist is completed, a green "Submit" button will be displayed at the top right next to the "Cancel" button.
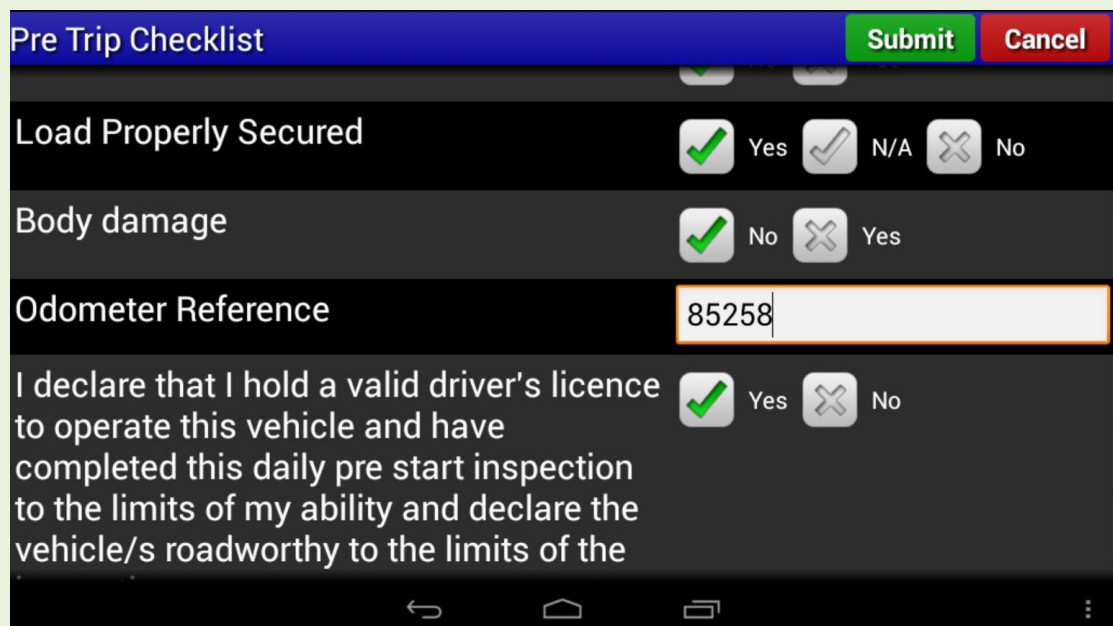

FIGURE 8 - SHOWING SUBMIT BUTTON WHEN ALL CHECKLIST QUESTIONS HAVE BEEN ANSWERED

2.2.1 CHECKLIST HISTORY

It is a legal requirement to show Enforcement Officers the completed Pre Trip Checklists when requested. It is also useful for drivers to view previously completed checklists when starting their shift. On the Pre Trip Checklist home page there is a checklist history button. Pressing this will open a list of the last 20 completed checklists. A green tick or red cross signifies if there was a failed question on each checklist. Selecting a checklist opens it to show the completed checklist.

FIGURE 9 - COMPLETED PRE TRIP CHECKLIST SCREEN

3 NEXTGEN - PRE TRIP CHECKLIST BUILDER

Under the "Configuration" Menu in NextGen, you will find the Pre Trip Checklist builder. Selecting this option will show you the existing checklists and fleets that they are associated with. To create a new checklist click on the "ADD NEW CHECKLIST" button at the top right of the screen.
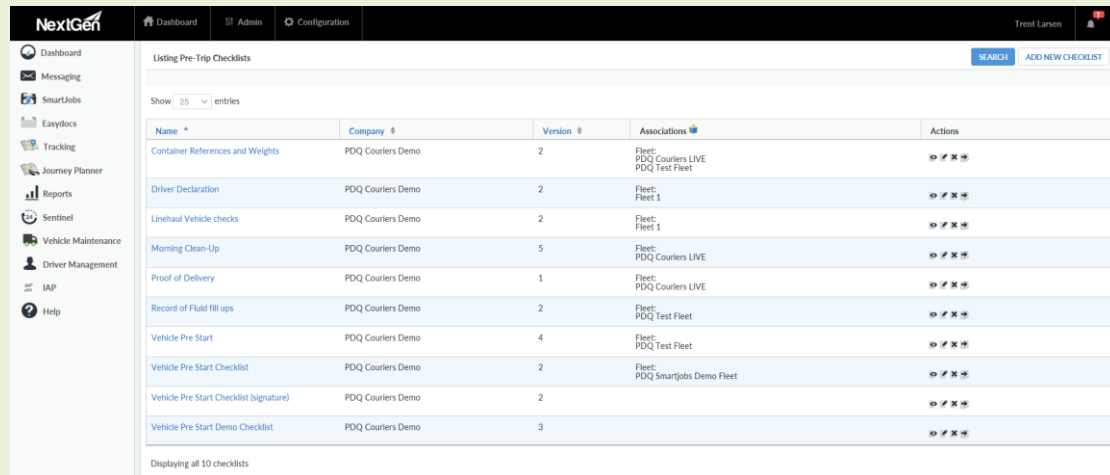

FIGURE 10 - PRE TRIP CHECKLIST BUILDER HOME SCREEN

Give the checklist a name and choose if you want the vehicle registration to form part of the checklist. If "Driver signature" is checked then the driver will be required to "sign on glass" at the completion of the checklist.
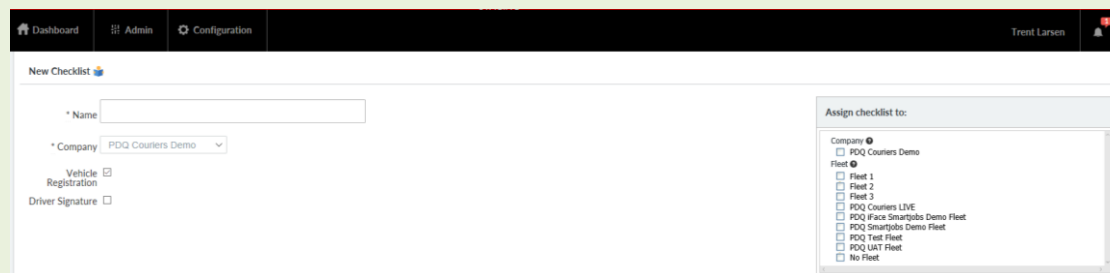

FIGURE 11 - NEW CHECKLIST FLEET ALLOCATION AND CONFIGURATION PANE

On the right hand side is the fleet allocation selection. Checklists can be assigned to individual fleets or assigned to all the vehicles in the company by selecting the appropriate checkboxes.

When creating the checklist questions, type in the question you want the driver to answer and select the answer type from the dropdown list. If the question is optional, check the "Allow Blank" check box.
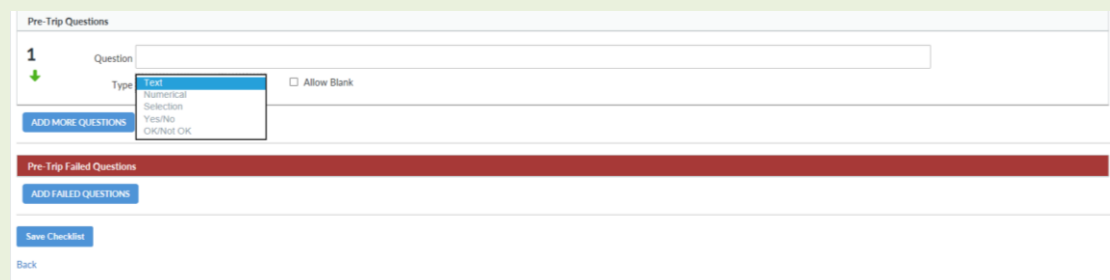

FIGURE 12 - SELECT QUESTION AND ANSWER TYPE

If you are selecting "Yes/No" or "OK/Not OK" you are also given the option to have "N/A" as an answer. For each "Yes/No", "OK/Not OK" or "Selection" type question you also must select which answer is a pass or a fail based on your company processes.
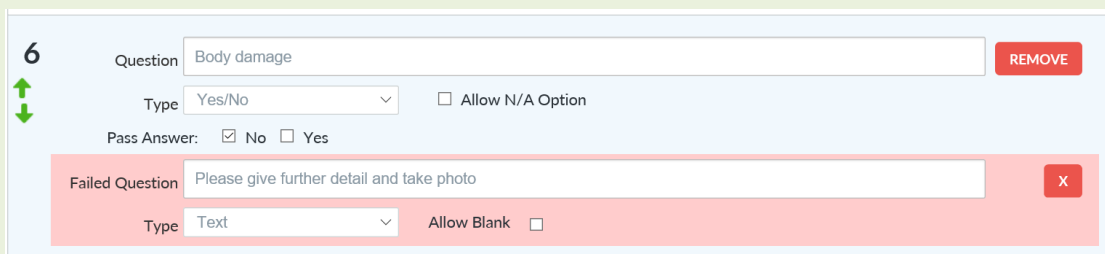
When you select "Selection" as an answer type you are presented with two options. By default, you can select to show the answers as radio buttons, or you can select the option to have a drop down. In both cases you need to record the questions answer, and record if it is a Pass Answer; by default it will be a Fail answer. You can keep adding options by using the "Add More Options" button.

FIGURE 13 - CHECKLIST BASED FOLLOW UP QUESTION

For each "Yes/No", "OK/Not OK" or "Selection" type question you have the option to ask another question to gain further information about a question that is marked as failed by the driver. Click on the "ADD FAILED QUESTION" button, enter the question and select the answer type as you would for a normal checklist question. All the options are the same. When a question fails, the driver will be asked for a photo by default, this does not have to be selected in Nextgen.

FIGURE 14 - FAILED QUESTION

Finally, you can choose to have questions display at the end of the checklist if any item has failed.

Use the ADD FAILED QUESTION button at the bottom of the screen and enter the question and select the answer type in the same manner as the previous questions that you have defined. You may continue to add more questions as required but the workflow available for the questions in the main body of the checklist is not available here.

3.1 MY ALERTS

Alerts can be raised for an individual checklist or a selection of checklists. You can also define which fleets or vehicles you wish to receive alerts for. Alerts will only be raised if a checklist question fails.
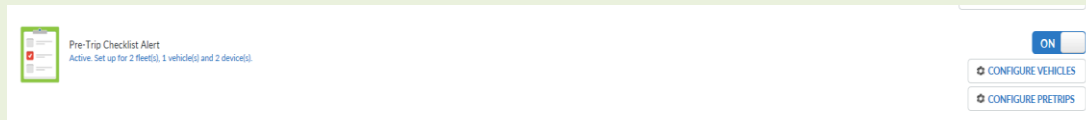

FIGURE 15 - MY ALERTS PRE TRIP CHECKLIST ALERTS

From the User menu at the top right of Nextgen, select "My Alerts" and scroll down to the Pre-Trip Checklist Alert. Click on "Configure Vehicles" to define which vehicles you wish to receive alerts for. A window will "pop up".
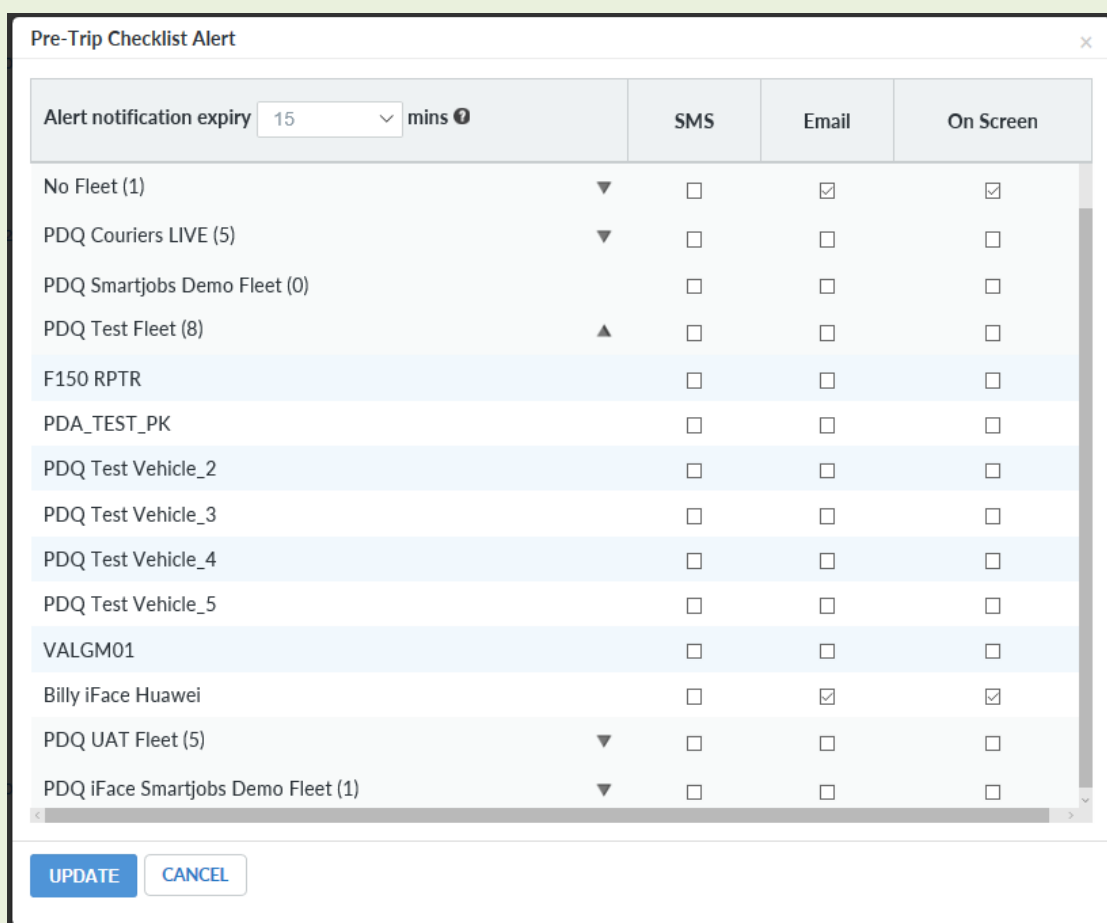

FIGURE 16 - CONFIGURING FLEET/VEHICLE ALERTS

By default it shows the fleets with an arrow next to each one. Clicking the arrow will expand to show the vehicles within that fleet. Choose the fleets or vehicles that you want to be alerted for, and the type of alert you want to receive. You can choose to receive all 3 alerting methods, SMS, email and On-Screen. Press "Update" when finished.

Then configure the Pre Trip Checklists that you want to be alerted for by clicking on the "Configure Pre Trips" button.

FIGURE 17 - CONFIGURING WHICH CHECKLISTS YOU WISH TO RECEIVE ALERTS FOR

As Pre Trip Checklists are assigned to a fleet you can either select to receive alerts for all checklists assigned to a fleet or subscribe on an individual checklist basis. You will only receive an alert if a question on the checklist has failed.

Once you have made your selection, click "update" to save.

3.2 REPORTS

The Pre Trip Checklist report is found under the "Compliance" heading in the reports section

Pre-Trip Checklist
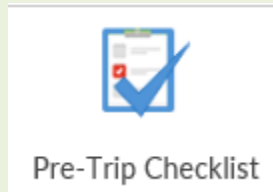
You may choose to run the report either by vehicle or driver. If selecting by vehicle you can select all vehicles in the company, in a fleet or choose individual vehicles.

If selecting by driver you can select all drivers in the company, in a branch or choose individual drivers. You can choose to run the report for all of the checklists or by "un-selecting" the Select All check box you can choose individual checklists to report on.

The "Display selection" option will show the number of checklists submitted for each vehicle/driver in the selection. This is important for highlighting the vehicles or drivers that have not completed the required checklists.

Like all reports you can also choose to schedule this report.