MANAGING THE ASSETS IN YOUR SYSTEM

How to view, add, edit, and manage safety checklists in the Vision Pro™ software database of your industrial truck management system.

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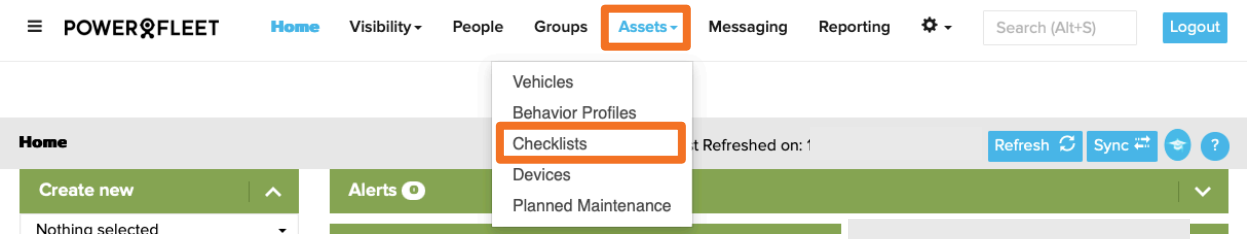

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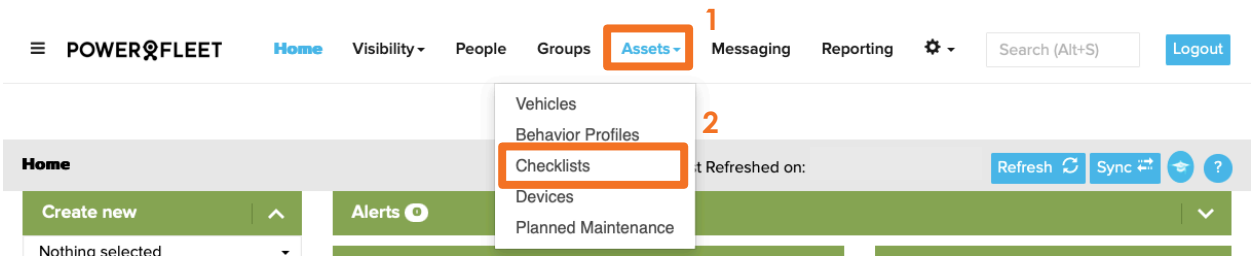
INTRODUCTION

The ASSETS section of your Vision Pro™ software lets you manage all the equipment associated with your industrial truck management system:

- The Vehicles being monitored.
- Basic Checklists for each Vehicle Type.
- Advanced Behavior Profiles for each Vehicle Type (automatic system reactions to various events, such as impacts).
- Planned Maintenance profiles for each Vehicle Type.
- Vehicle Batteries, if applicable.
- System Devices, including Vehicle-mounted devices (VACs) and communication infrastructure hardware (WAMs, Beacons, and/or Wi-Fi Access Points).

This User Guide details how Checklists are viewed, edited, added, and managed in the Vision Pro™ software.

To get started, as shown below:



1. From the Vision Pro™ software home screen, click the Assets drop-down list.
2. Select Checklists from the drop-down list.

VIEWING CHECKLISTS

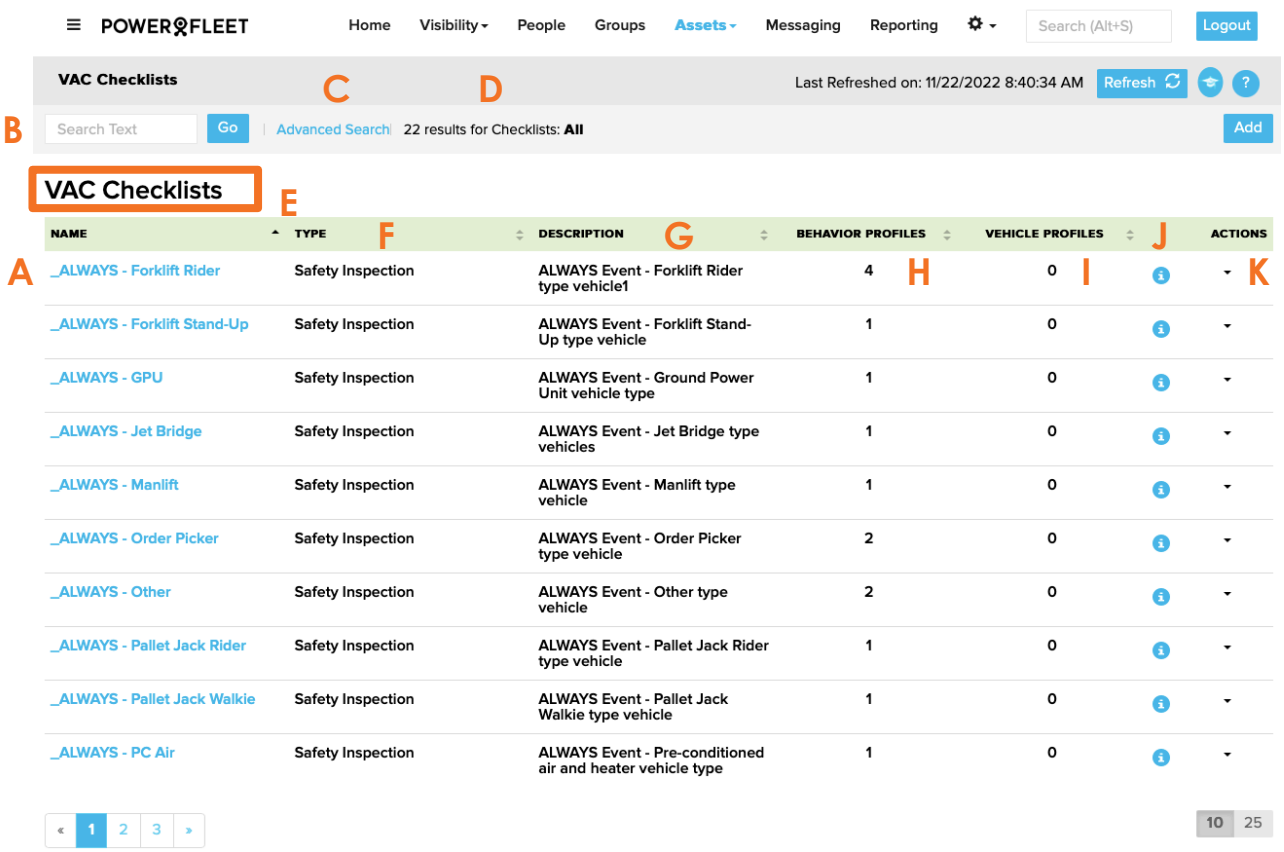
NOTE

Vehicle Checklists are a key part of your industrial truck management system. The system comes with many pre-defined Checklists, including Vehicle Safety Inspection Checklists (often required by government agencies, like OSHA), and special Checklists (such as Supervisor Checklists used to unlock Vehicles after safety lock-outs). Checklists are highly customizable.

Your system automatically assigns Checklists to each Vehicle, based on Vehicle Type. The Type is defined during installation of the system's Vehicle-mounted devices (VACs); it can be a piece of material handling equipment (Forklift Rider, Pallet Jack Walkie, Tow Tractor, etc.), other kind of vehicle (Man Lift, Scrubber, etc.), or a class of airport Ground Support Equipment (GSE).

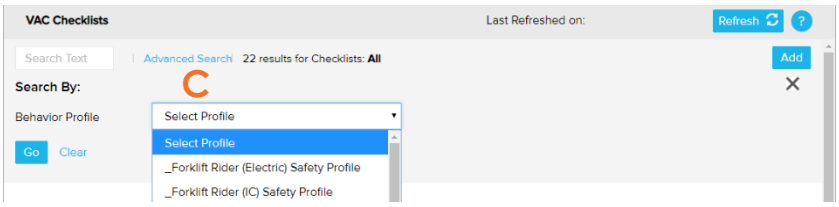
Viewing the List of Checklists

Clicking Checklists on the Assets drop-down list will open the VAC Checklists screen:



Checklists are listed by Name [A]. Clicking on a Name will let you view the details of (and make changes to) that Checklist. Names that start with an underscore ("_") are the pre-defined Checklists that come with the system. If you create a new Checklist, you can name it whatever you wish, without an underscore. (See Adding Checklists.)

You can filter the list of Checklists by entering keywords into the Search Text Box and then clicking [B] Go; or by clicking on Advanced Search [C], which opens a pop-up window, shown at right. This allows you to see which Checklists use which Behavior Profiles. (See also separate User Guide on Behavior Profiles.)



At the top of the screen, you can see how many Checklists are in your current view and what filters, if any, are applied to the view [D]. ("All" means NO filters are applied.)

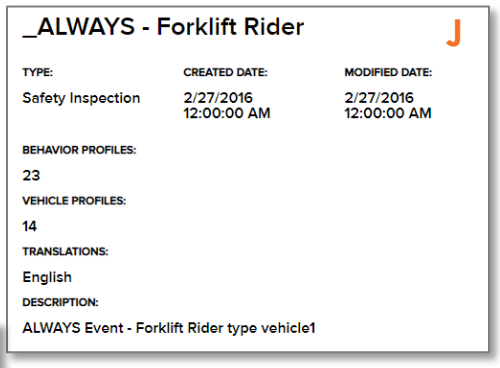
You can sort Checklists by any column that has an up/down arrow at the top, e.g. [E].

The Type of each Checklist [F] is selected by default.

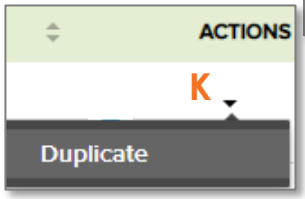
The Checklist Description [G] is pre-defined for each Checklist that comes with the system. But you can write your own description for each new Checklist you create.

You can see how many different Behavior Profiles each Checklist is used in [H], and how many Vehicles (Vehicle Profiles) use each Checklist [I].

Clicking on a Checklist's Information sign [J] will open a pop-up window, like the one shown at right, which lists information about that Checklist, including its Created Date, last Modified Date, and what language Translations it has.



In the Actions column, clicking on the drop-down arrow at the end of a Checklist row [K] will let you Duplicate that Checklist. This is helpful when creating a new Checklist that is similar to an existing Checklist. (See Editing Checklists.)



At the bottom of the screen, you can choose how many Checklists are visible on the screen at one time (e.g. 10 per screen) [L], and which screen to view (e.g. with 10 Checklists per screen, screen 1 will show Checklists 1-10) [M].

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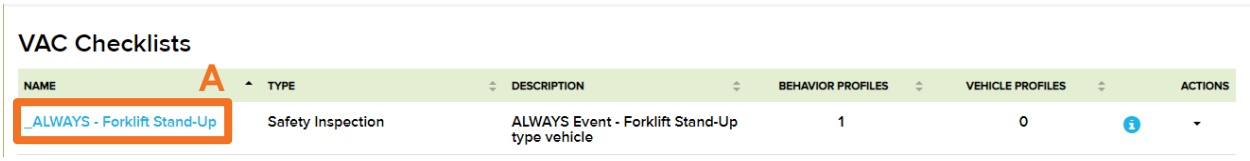
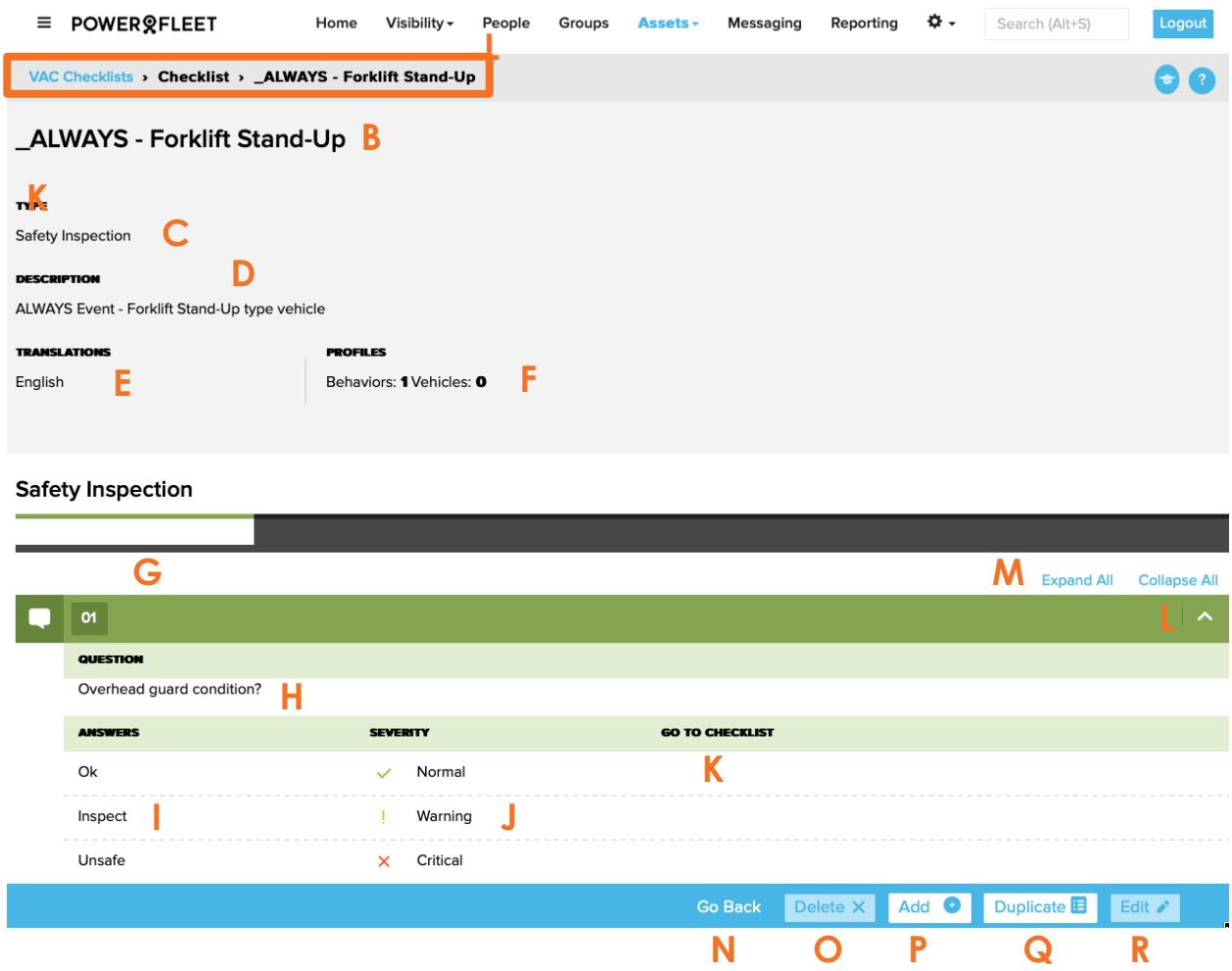
Viewing Specific Checklist Information

To see the contents of a specific Checklist, click on the Name of that Checklist [A]:



A screen for that specific Checklist will appear, with the following information:



The Name of the Checklist [B].

The Type of Checklist it is [C].

A Description of the Checklist [D].

Translations (future feature) available for Checklist [E].

How many Profiles (Behaviors and Vehicles) are linked to the Checklist [F].

The Number of each Question [G].

NOTE: Scroll down the screen to view all the numbered Questions.

The Question text [H], which shows the Question that will appear on the screen of the Vehicle-mounted device (VAC).

The Answers text [I], which shows the multiple-choice Answers that will appear on the VAC screen.

The Severity [J] assigned to each Answer, which enables the system to react automatically to the chosen Answer. (You decide how the system reacts. See Editing Checklists or Adding Checklists.) Typically, a Normal Severity is only logged and recorded in a report, a Warning Severity is flagged for maint-enance (by text message, email, and/or report), and a Critical Severity prevents the Vehicle from being operated (and alerts maintenance).

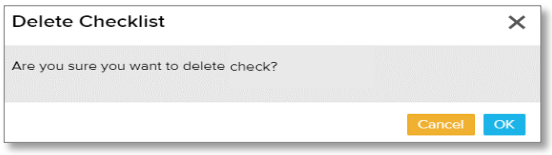
An Answer can also trigger another Checklist (e.g. if the Answer indicates a problem, you can create a sub-checklist that asks more detailed questions about that problem). Any sub-checklists linked to the main Checklst will appear under Go to Checklist [K].

You can collapse or expand the view of a Question's details by clicking the arrow on the right side of the number bar [L].

You can also collapse or expand the view of *ALL* Question details at the same time by clicking Collapse All or Expand All, above number bar [M].

Clicking Go Back [N] returns you to the previous software screen.

Clicking Delete [O] launches a pop-up window, shown below, that prompts you to confirm deletion of the entire Checklist.



NOTE: You CANNOT delete the pre-defined Checklists that come with the system.

Clicking Add [P] lets you create a new Checklist from scratch, with all new Questions. (See Adding Checklists.)

Clicking Duplicate [Q] lets you create a new Checklist starting with the same Questions as the Checklist you duplicated. You will then be prompted to rename the new Checklist and modify it to make it unique. (See Adding Checklists.)

Clicking on Edit [R] lets you edit the current Checklist. (See Editing Checklists).

NOTE: You CANNOT edit the pre-defined Checklists that come with the system.

TYPES OF CHECKLISTS

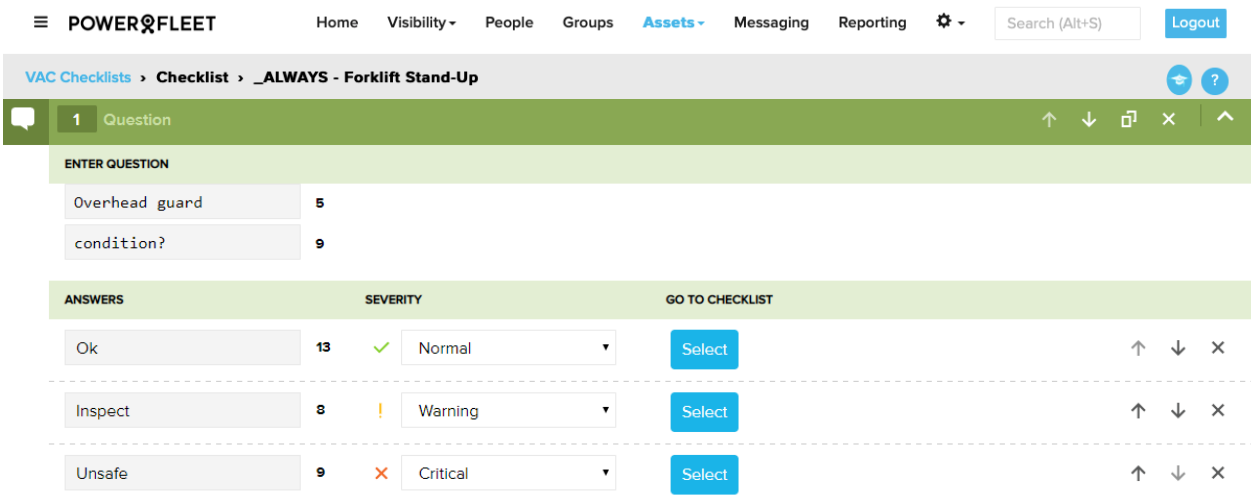
Before you add a new Checklist or edit an existing Checklist, it is important to understand the different types of Checklists available in the system.

Basic Vehicle Inspection Checklists

The most common type of Checklist is a basic Vehicle Inspection Checklist, which an Operator must complete before using a Vehicle. This type of Checklist may be required once per day, once per shift, or every time an Operator logs into a Vehicle. "Every login" is the default selection.

The system includes many variations of the Vehicle Inspection Checklist; each Vehicle Type gets its own variation. The names of all of these variations start with "_ALWAYS."

The example below shows the first Question on the "_ALWAYS - Forklift Stand-Up" Vehicle Inspection Checklist: "Overhead guard condition?" If Answer is "OK," it is simply recorded; if it's "Inspect," maintenance is alerted; if it's "Unsafe," the Vehicle is locked.

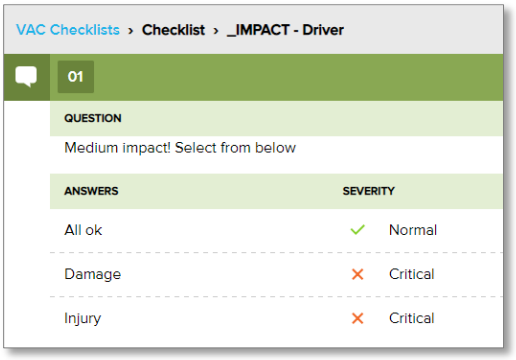


Operator Impact Checklist

The system also includes an Operator Impact Checklist — a "self-policing" tool that helps improve driving behaviors, reduce accidents, and lower damage costs.

When a Vehicle has a medium-level impact, this Checklist pops up to (a) remind the Operator that collisions are recorded and (b) force the Operator to acknowledge the impact. This influences Operators to pay more attention and drive more cautiously.

As shown at right, the Operator Impact Checklist included in the system is called "_IMPACT - Driver." It has a single Question with 3 possible Answers. If the response is "All ok," the Operator can go back to work. But if the response is "Damage" or "Injury," the Vehicle will be locked out and require a Master Operator (supervisor) or Maintenance Operator to inspect and unlock the Vehicle.



Release Lockout Checklists

When the system locks out a Vehicle due to a safety issue, a Master or Maintenance Operator (based on configuration) must inspect and unlock the Vehicle using a Release Lockout Checklist.

The system includes 3 essential Release Lockout Checklists, as described below:

Cause of Vehicle Lockout	**Release Lockout Checklist**		
	Name	**Question(s)**	**Answers**
Vehicle Inspection Checklist problem with Critical Severity	_CRITICAL - Release Lockout	Is all equipment safe to operate?"	Yes/No
Severe or Critical level impact, OR Operator Impact Checklist indicates Damage or Injury	_IMPACT – Release Lockout	Was anyone injured? Is the vehicle damaged? Is any other equipment damaged? Is there facility damage? Is all equipment safe to operate?	No/Yes No/Yes No/Yes No/Yes Yes/No
Operator fails to complete Vehicle Inspection Checklist	_NONCOMP – Release Lockout	Is all equipment safe to operate?"	Yes/No

Other Checklists

The system also includes Planned Maintenance (PM) Checklists for each Vehicle Type. The PM Checklist, which cannot be edited, appears when a Maintenance Operator presses the "check" button on the Vehicle-mounted device (VAC). It simply asks if a PM has been completed. If "Yes," the system resets its PM counters to track the next PM due.

Some system options include other types of Checklists, as well. For example, the Job Codes Module uses Checklists to log/track what tasks Vehicle Operators perform.

Both Planned Maintenance and Job codes are optional, licensed-required features.

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ADDING NEW CHECKLISTS

NOTE: You may NOT need to add new Checklists to the system.

Your system comes with pre-defined Checklists, which are automatically assigned to each Vehicle based on Vehicle Type. The Vehicle Type is selected during installation of the system's Vehicle-mounted devices (VACs).

Before adding a new Checklist, you should review the list of Checklists already in the system, and examine the Questions and Answers in each existing Checklist.

If you decide to add a Checklist, there are two ways to do so:

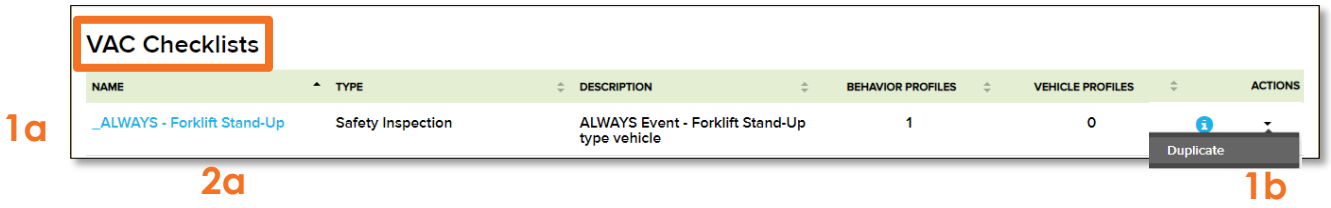
- Duplicate an existing Checklist and modify it.

OR

- Build a new Checklist from scratch, with all new Questions and Answers.

TIP: If you know that the new Checklist you want to add is similar to an existing one, the easiest way to add it is to duplicate and modify the existing Checklist.

Duplicating Checklists



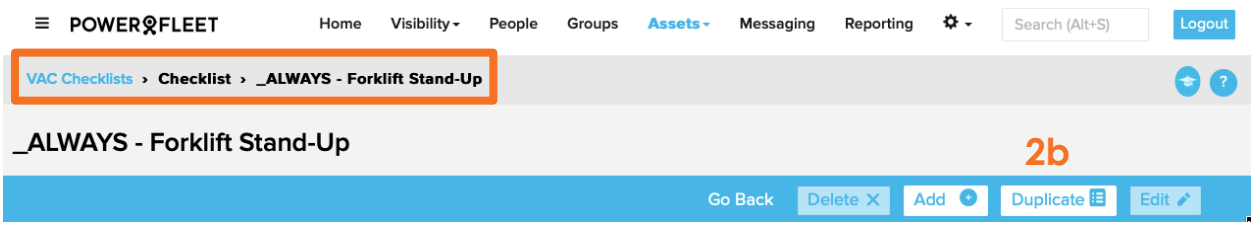
1. (**a**) On the main VAC Checklists screen, locate an existing Checklist that is similar to the new Checklist you want to add.

   (**b**) Click on the drop-down arrow at the end of that Checklist's row (under Actions) and select Duplicate.

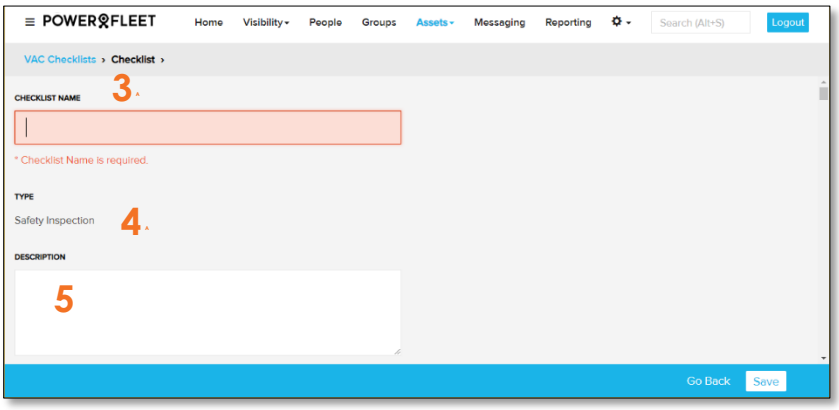
OR

2. (**a**) Click directly on the Name of the Checklist that you want to copy.

   (**b**) When that Checklist's content screen appears (example below), click Duplicate.



Whichever way you select Duplicate, a new Checklist content screen will appear, as shown at right. NOTE: The Checklist Name and Description fields will be blank, since you are making a new Checklist. But all Questions and Answers will be the same as the existing Checklist you duplicated.



3. Enter a unique Checklist Name for the new Checklist (REQUIRED).

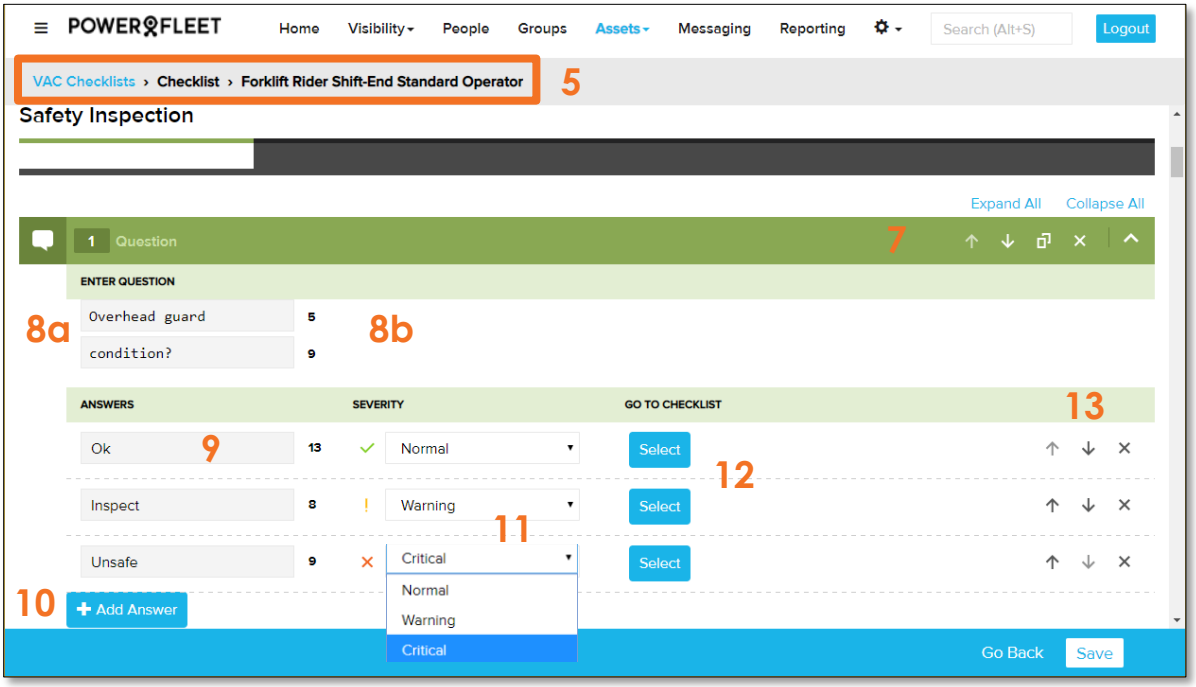
   TIP: Use a consistent naming convention (nomenclature) for new Checklists, such as Vehicle Type/Sub-Type/Frequency/User Type. (In the example below, the new Checklist is named "Forklift Rider Shift-End Standard Operator").

4. Select Checklist Type from drop-down list. (Default may be only one option.)

5. Optionally, fill in a Description of the new Checklist.

6. Note that the new Checklist Name you entered now appears at the top of screen.

7. Scroll down to the Checklist Questions (duplicated from the existing Checklist you started with). You can edit, delete, or add Questions/Answers as described below.



8. Edit an entire Question using the icons on right side of the Question's number row, as shown at right. Change Question order with the up/down arrows. Add a copy of Question with the Duplicate icon. Delete the entire Question with the X icon.

Move order of Question up or down | Add a duplicate Question | Delete Question

9. (**a**) Edit text of Question under Enter Question.

   Note: you can use two lines of text.

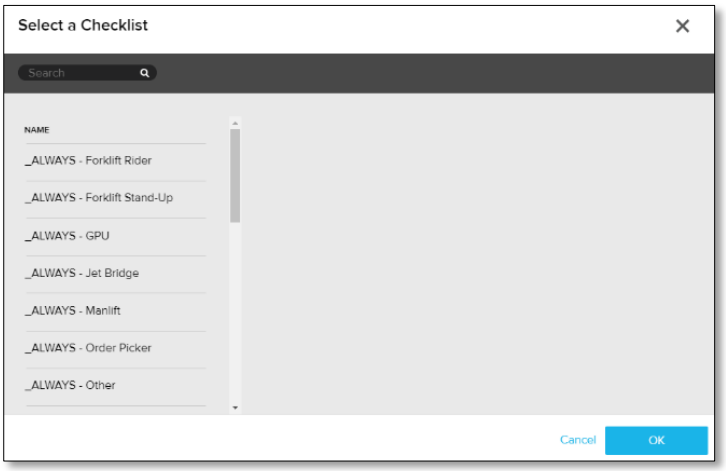
   (**b**) Note also: each line of text has a 19-character limit. The number to the right of each Question line shows how many characters remain available in that line.

10. Edit text of multiple-choice Answers. Note: each Answer has a 15-character limit; the number to the right of each Answer shows how many characters remain available in that Answer.

11. Enter additional Answers by clicking the Add Answer button. (To delete an Answer, click the X at the end of that Answer's row, as described in item 12, below.)

12. Choose a Severity for each Answer with the drop-down list next to each Answer. The three choices are Normal, Warning, and Critical.

13. If you want an Answer to launch another Checklist, click Select under Go to Checklist. A pop-up screen will appear, as shown at right. Click on the Checklist you want the Answer to launch, then click OK.



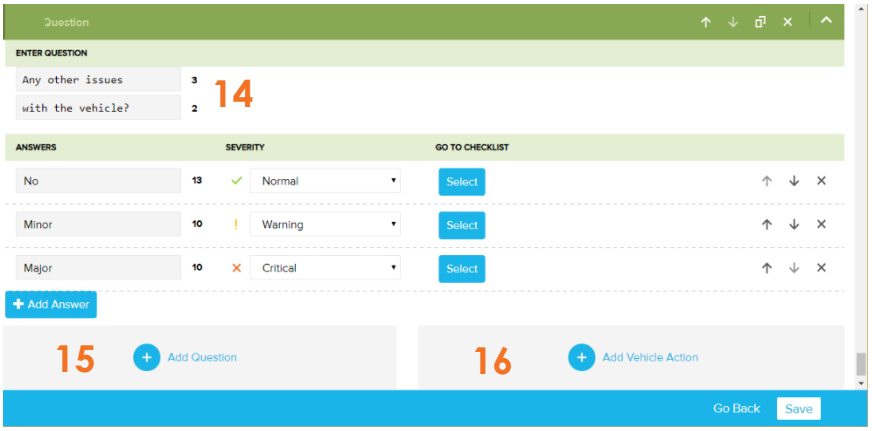
   This feature is often used to request more details about a problem. For example: if the main Checklist Question asks "Vehicle error indicators on?," the Answer "Yes" could launch another Checklist (think of it as a "sub-Checklist") that asks which specific indicator has an error.

   NOTE: If you need to create a new Checklist to go to, see Adding New Checklists from Scratch, below.

14. Edit an entire Answer with the icons on right side of the Answer's row, as shown at right. Change Answer order with the up/down arrows. Delete the entire Answer with the X icon.

Move order of Answer up or down | Delete Answer

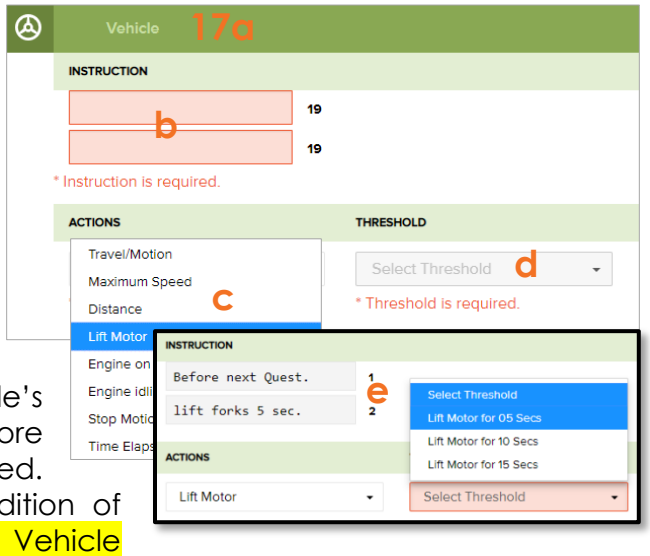
15. As a best practice on Vehicle Inspection Checklists, the last Question should be: "Any other issues with the vehicle?" Answers, as shown at right, should be "No" (Normal Severity), "Minor" (Warning) and "Major" (Critical).



NOTE the buttons under last Checklist Question: Add Question and Add Vehicle Action.

16. To add a new Question to the Checklist, click Add Question. A new, blank Question will appear at the end of the Checklist, which you can define as you wish.
REMEMBER: You can change the order of Questions on the Checklist by using the up/down arrows on right side of Question's number row, as described in item 7, above. Move the new Question up/down to wherever you want to place it.

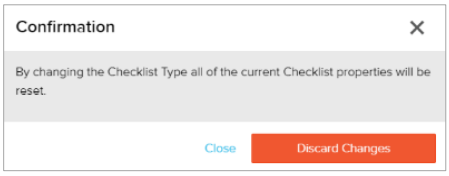
17. To require Operators to perform an action on a Vehicle *before* they answer a Question, click Add Vehicle Action. A new item will appear at the end of the Checklist, as shown in the example at right (a).



Enter text in the Instruction fields (b) to describe the action to be taken, then use the drop-down lists to choose the Action (c) and Threshold (d).

In the example at right (e), the Vehicle's forks must be lifted for 5 seconds before next Checklist Question can be answered. (That Question would be about condition of mast or lift motor.) NOTE: Position the Vehicle Action on Checklist so it is *in front of the Question to which it applies*.

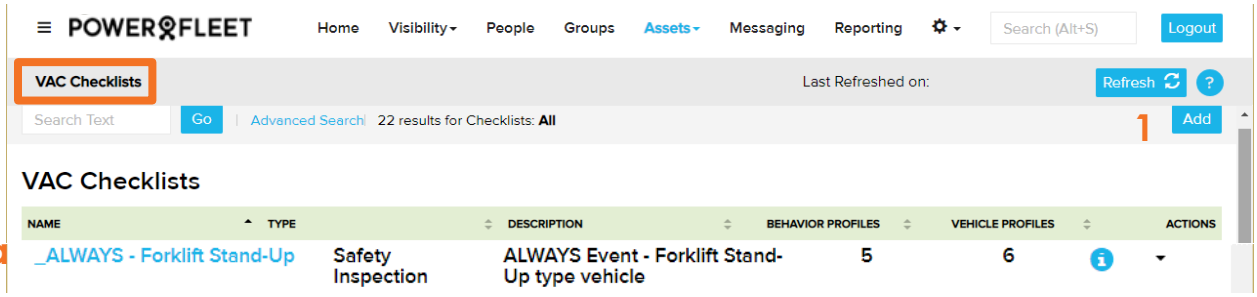
18. Click Go Back to return to previous screen at any time. If you haven't saved changes, a pop-up window, shown at right, will confirm that you want to Discard Changes.



19. Save changes to the new Checklist by clicking Save.

Adding New Checklists from Scratch

If you need to add a new Checklist to the system from scratch:

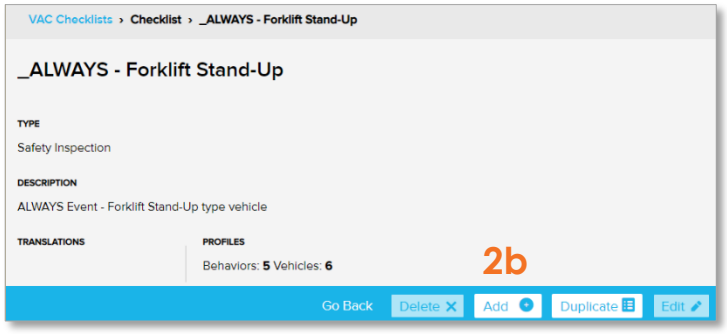


1. Click the Add button on the top-right of the VAC Checklists screen.

OR

2. (**a**) Click on a Checklist Name.

   (**b**) Then, on the Checklist content screen, as shown at right, click Add.



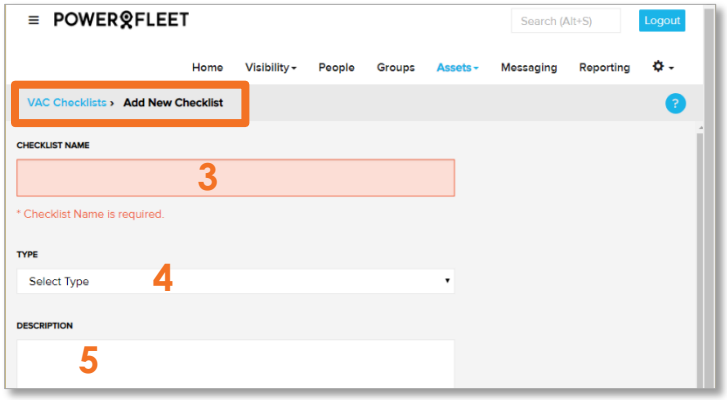
Whichever way you select Add, the VAC Checklists > Add New Checklist screen will appear, as shown at right.

3. Enter a Checklist Name for the new Checklist (REQUIRED).

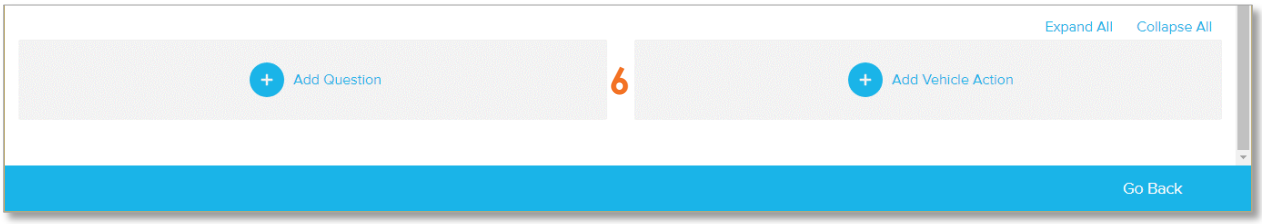
   TIP: Use a consistent naming convention (nomenclature), as noted in item 3 under Duplicating Checklists, above.

4. Select Checklist Type from drop-down list.

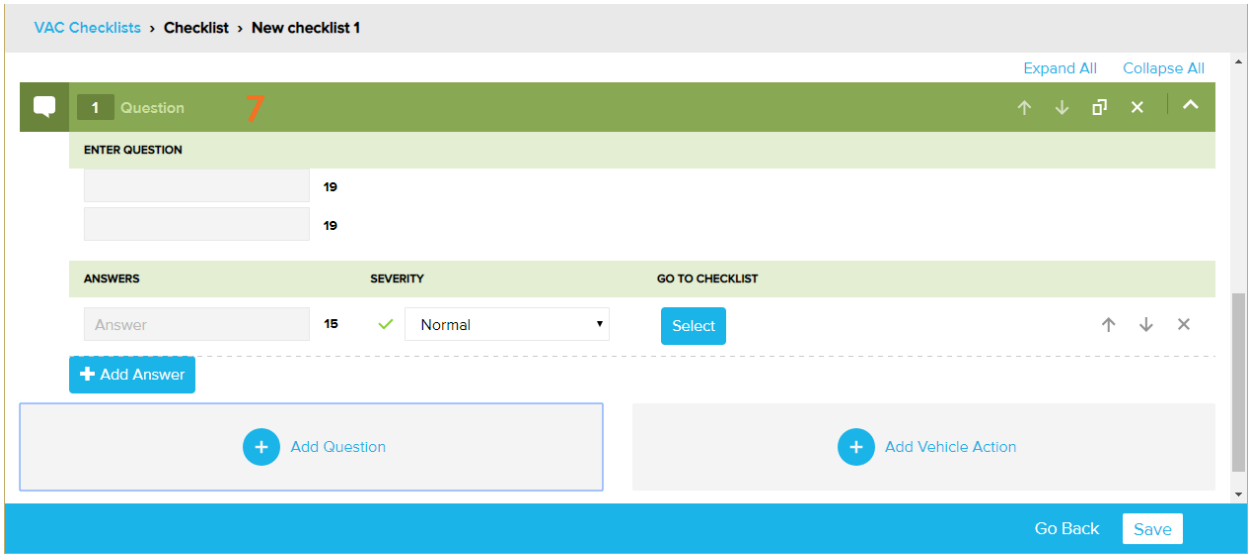
5. Optionally, fill in a Description of the new Checklist.



6. Scroll down to bottom of screen and click Add Question or Add Vehicle Action.



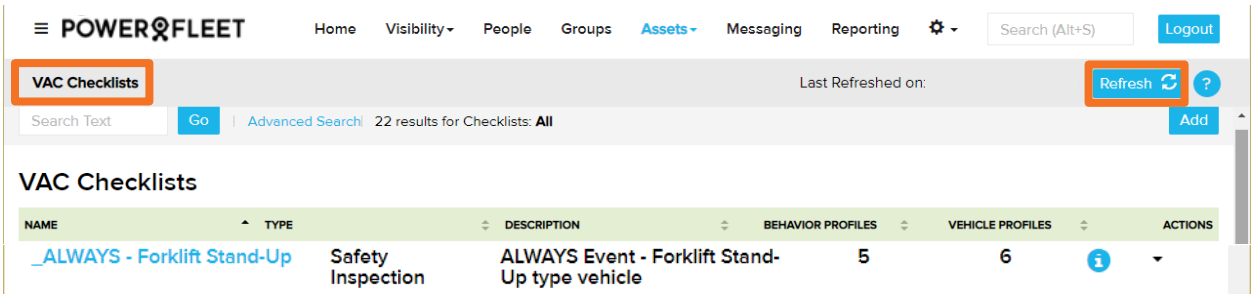
7. A blank Question 1 will appear, as shown below:



Enter the first Checklist Question/Answers, add more Questions/Answers, add Vehicle Actions, and rearrange order of Questions/Vehicle Actions by following instructions provided in items 8 – 18 under Duplicating Checklists, above.

Refreshing and Synchronizing List of Checklists

After adding new Checklists, you can refresh the list of Checklists on the VAC Checklists screen by clicking Refresh.

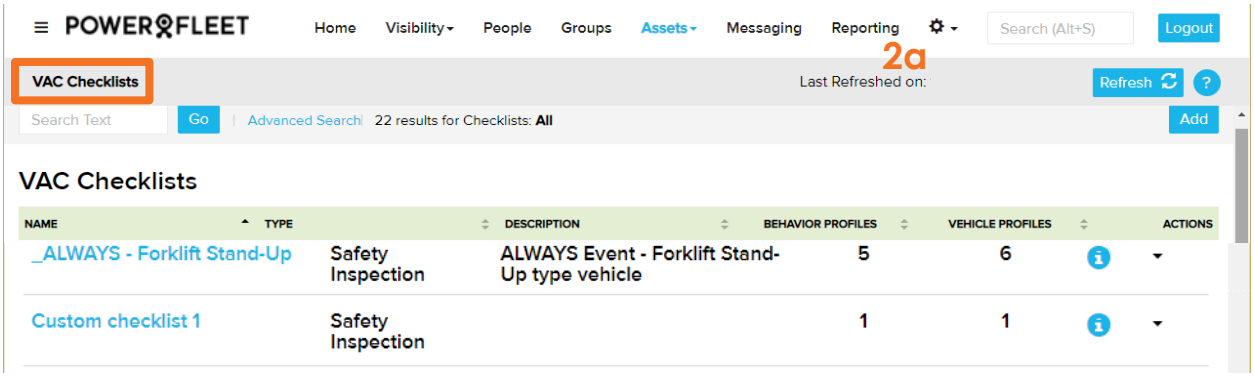


NOTE: The system will automatically "sync" new Checklists with the Vehicle-mounted devices (VACs) within about four hours.

EDITING CHECKLISTS

Before editing a Checklist, you should review the list of Checklists in the system, and examine the Questions and Answers in each Checklist.

To edit a Checklist…



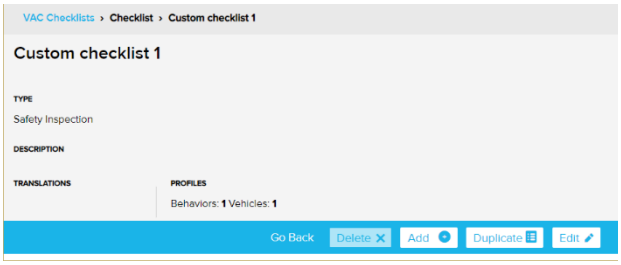
1. From the VAC Checklists screen, click the Name of the Checklist you want to edit.

   (**a**) If the Checklist you want to edit is a *pre-defined Checklist that came with the system*, you CAN ONLY DUPLICATE the checklist and customize accordingly; you CANNOT EDIT EXISTING Questions/Answers.

   (**b**) If the Checklist you want to edit is a *custom Checklist created after the system was installed*, you CAN edit existing Questions/Answers, as well as add them.

2. After clicking Checklist Name, the corresponding Checklist content screen will appear:

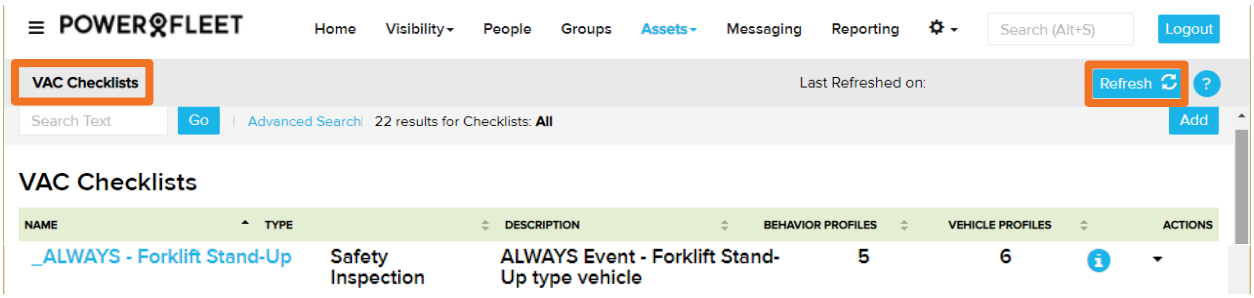
   (**a**) To edit a custom Checklist that was created *after* system was installed, click Edit, as shown in the example at right.



Edit existing Checklist Question/Answers, add more Questions/Answers, add Vehicle Actions, and rearrange order of Questions/Vehicle Actions by following instructions provided in items 7 – 18 under Duplicating Checklists, above.

Refreshing and Synchronizing List of Checklists

After editing Checklists, you can refresh the list of Checklists on the VAC Checklists screen by clicking Refresh.



NOTE: The system will automatically "sync" new Checklists with the Vehicle-mounted devices (VACs) within about four hours.