

PSTRAX SUCCESS GUIDE: VEHICLE MODULE

These checklists are designed to help you implement PSTRax successfully, from initial setup to full deployment. Remember that we're here every step of the way, so feel free to reach out with any questions or adjustments.

» PHASE I: Review & Fine-Tune the System

- Complete admin training.** Go to **Help > Admin Training > Vehicle/Station Module Training** to explore admin training tutorials. Or sign up for one of our weekly webinars [here](#).
- Verify vehicles.** Go to **Vehicle & Station > Fleet Status Report (Table)** and ensure all vehicles are in the system. You can edit, add, or remove vehicles as needed. [Learn more](#).
- Activate vehicle checklists.** On the vehicle card in the Checks panel, click the **Active/Inactive** label to view the checklists for that unit. Select the due date for each checklist and click save. For initial testing, we recommend setting all due dates to on or before today so you can view every checklist as users would see them. [Learn more](#).
- Set up alert categories & recipients.** Alert categories ensure that appropriate users receive notifications for specific types of alerts. Go to **Settings > Vehicle & Station > Alert Categories & Recipients** and add or edit categories to your liking ("Vehicle Maintenance", "Equipment", "Supplies", etc.). [Learn more](#).
- Log a truck check.** Check off a vehicle using the checklist in PSTRax (click **# Vehicle checks** from the Station Home screen). Log tasks and set fake alerts to get used to the workflow. Take note of any discrepancies between the physical unit and what shows in the system. Repeat this for your other units as needed. Note that this can take a while, so it's best to enlist help from other crew members who know the vehicles well. [Learn more](#).
- Update and close an alert.** After setting an alert during a truck check, add comments and edit the alert from the Station Home screen (click the **V/S** tab on the **ALERTS** panel), or from **Vehicle & Station > Alerts > Open Alerts > Actions**. [Learn more](#).
- Adjust checklists.** On each vehicle card, click **Actions > Edit Checklists** to edit the inspections on your vehicles. Make sure all items are included, equipment is ordered properly, and the intervals are set up correctly. If one checklist applies to multiple vehicles, make the edits to one, copy it to the other unit(s), and delete the old checks. Or just jot down any adjustments and send them to your Build Manager to complete. [Learn more](#).

- **Set up status report recipients.** The vehicle status report is a daily email that summarizes each station's activities. Go to **Settings > Vehicle & Station > Status Email Recipients** to add your station officers and other recipients. [Learn more.](#)
- **Adjust system settings.** The following options can be adjusted by our team to match your preferences. Please let us know if you'd like to make changes.
 - **# Alert days** – The number of days Vehicle & Station (V/S) alerts display in the Alerts panel until they drop off the home page. This is defaulted to 30 days. [Learn more.](#)
 - **Color code vehicles & stations** – Vehicles & Stations can be color-coded to help identify different units. [Learn more.](#)
 - **Status report time** – This report can be sent between noon and midnight. You typically want to set it late enough so crews can finish their checks, but early enough to catch outstanding checks and notify crews to complete them. [Learn more.](#)
 - **Check-all tasks** – The option to check all items in a group of vehicle checks can be enabled to make the checks go faster for your users. By default, this is disabled, but [here's how](#) to enable.
 - **Combine alerts** – When setting alerts on multiple tasks, users can set separate alerts for each task (for alerts that will be handled separately) or combine all tasks into one alert (for alerts that will be closed at the same time). The default can be set to separate alerts, combine alerts, or the option to combine alert can be removed altogether. [Learn more.](#)
 - **Add custom alert fields** – Up to three custom fields can be added to all vehicle & station alerts, so you can gather more information for reporting or operational needs. [Learn more.](#)
 - **Checklist view options** – Vehicle checks show all tasks expanded by default. This can be adjusted to hide the tasks from view each time the page is opened. [Learn more.](#)
 - **Show inspection notes** – Inspection notes allow users to add details about their truck checks that others can see. This option is defaulted to yes, but that can be changed. [Learn more.](#)
 - **VS Managers can manage schedule** – Vehicle/Station Managers can take vehicles in and out of service and move vehicles from one station to another. By default, they can also enable/disable vehicle checklists. This can be adjusted so only Vehicle/Station Admin are able to turn on/off the checklists. [Learn more.](#)
- **Review best practices.** Don't reinvent the wheel! Check out our Knowledge Base to see how other organizations are using PSTrax to track their vehicle checks & inventories. [Learn more.](#)

» **PHASE II: Roll-Out to Your Crews**

- Verify user access.** Go to your **Settings > Personnel > User List** to make sure all users who should have access to the Vehicle/Station module are listed in PSTrax, and have the correct [permission levels](#).
 - Send login information to users.** You should have received username and password information from your Build Manager, but you can access it again from the **User List**. Pass this along to each user when you're ready to have them access the system.
 - Provide training materials to users.** Once they log into PSTrax, have users go through a step-by-step training checklist to learn the module in detail (**Help > User Training > Vehicle/Station User**). You can also post our [Vehicle & Station User Training Videos](#) into your training platform ahead of time.
 - Have users log checks and report findings.** Users assigned to specific vehicles should complete a comprehensive truck check in PSTrax and document any necessary adjustments. While some agencies permit all of these users to edit checklists, we recommend filtering these changes through a limited number of administrators to ensure consistency in the checks and avoiding "too many cooks in the kitchen".
 - Make adjustments.** After identifying adjustments, make the corrections yourself (if you feel comfortable), or collaborate with your Build Manager to facilitate the necessary changes. Note that you may require multiple rounds of adjustments as you get input from more users.
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» **PHASE III: Go-Live with PSTrax**

- Pick a day to go-live.** It's helpful if you let us know what date you choose at least a few days in advance so we can prep on our end. Note that you **DO NOT** have to go live with all modules at the same time. Some agencies prefer to roll-out the modules in phases.
- Clear out test data & reset schedules.** We'll help you delete your test logs and alerts, if applicable. None of the settings changes you've made (checklist adjustments, user edits, etc.) will be affected. Your schedules can be reset to start on or after your go-live date.