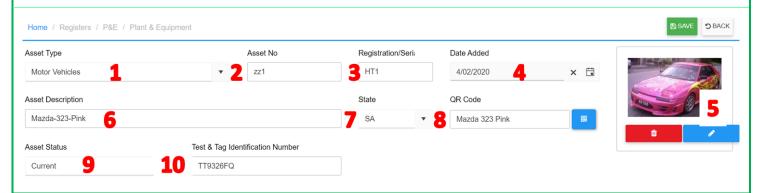


From Registers/P&E/Plant & Equipment click +ADD NEW.

- 1. Select the Asset Type from the Menu depending on the asset type chosen different fields will be displayed, see below for more details.
- 2. Type in an Asset No.
- 3. Type in the Registration/Serial No.
- 4. Select **Date Added**, this will default as todays date.
- 5. Click to add an image for the asset.
- 6. Type in the Description for Motor Vehicles this will auto populate, section D below.
- 7. Select a State this field is mandatory if "Using States" is selected in Company Settings.
- 8. **QR Codes** can be added by staff with certain security levels in the mobile app.
- 9. Status will default to Current and should only be change when an asset is sold or disposed of.
- 10. If applicable type in a Test & Tag ID No.



- 11. Tick if this asset will be a shared item, see below.
- 12. If this item has a Safety Data sheet, ticking the box will add an entry to the <u>Safety Data Sheet Database</u> where you can upload the required document.
- 13. If this item has an Equipment Manual, ticking the box will add an entry to the **Safety Equipment Manual Database** where you can upload the required document.
- 14. Tick if a Risk Assessment is required see below.
- 15. Assigned To will default to Staff, change to location or Customer Site as required see below.
- 16. When Staff is selected you can chose a Licence Type that is required to operate this item. If the staff member does not have a valid version of this licence type an error will display. Multiples can be choosen & they can be deleted.
- 17. If the asset requires regular plant inspections select the template to use.

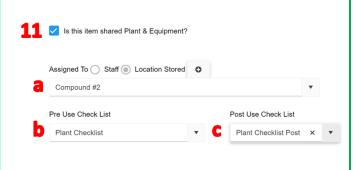
 These are created in Administration/Templates/Forms. Only forms that have been locked will show in the list.
- 18. Select the appropriate PPE required when using this item. Multiples can be selected & use the X to remove items.



- 11. When Share Plant & Equipment is tick:
 - a. The item will default to "Location Stored" Select one from the drop down list.
 - b. Select a Pre Use Check List to be completed on the mobile app.
 - c. Select a Post use Check List to be completed on the mobile app.

NOTE: the checklists are optional.

Items can be **Booked** on the web app, with **Collecting** and **Returning** being completed on the mobile app.





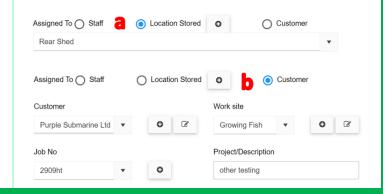
When the box for "Risk Assessment Required?" is ticked you will need to select a completed date and attach a PDF of the form completed.



15. Assigned to:

- a. Location Stored from the drop down list or click to add a new one.
- b. Customer select a Customer, Work site & Job No or click + to add a new ones.

These assets will show in Project Management when it is ticked in your Company Settings.

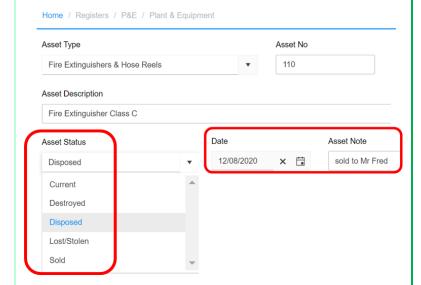


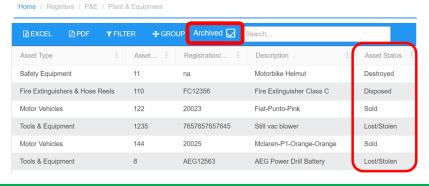
A. Disposing of Assets

- When an asset has been sold or disposed of open the item from the Plant & Equipment Register.
- Change the asset status as required.
- Select a Date & complete the Notes.
- Click 🖫 SAVE .

When the status is anything other than "Current" the item will not be displayed in the P&E register.

All outstanding tasks i.e. registrations, insurance, maintenance items etc will all so be marked as archived.





To view items that are non-current tick the "Archived" box in the Plant & Equipment Register.

B. Fire Extinguishers & Hose Reels

Select the type of Fire Extinguishers/Hose Reels Types under Assigned To.

You can select as many of the types that apply to the extinguisher or reel from the drop-down list.

Clicking on the <u>Fire Equipment Maintenance</u> button will add this item to the maintenance register for regular checks (section B).

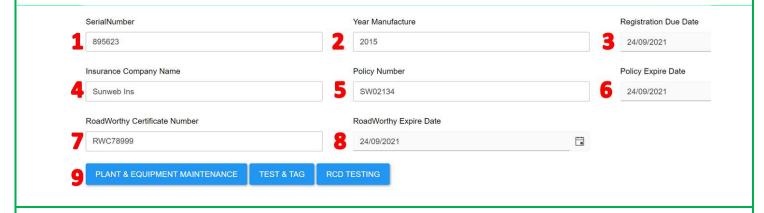
Fire Extinguishers/Hose Reels types can be edited in:

Administration/Asset Management/Fire Extinguisher/Hose Reels.

els.

C. Lifting Equipment

- 1. Serial Number serial number if required in addition to Registration No
- 2. Year of Manufacture What year was it made
- 3. Registration Due Date select from date picker (if road registered)
- 4. Insurance Company Name Name of insurer
- 5. Policy Number insurance policy number
- 6. Policy Expiry Date date insurance policy expires
- 7. Roadworthy Certificate certificate number (if applicable)
- 8. Roadworthy Expiry Date date roadworthy expires (if applicable)
- 9. To add tasks to Plant & Equipment Maintenance, Test & Tag and RCD Testing registers click on the blue buttons.



Registration and Insurance Documents can be added in the section below.

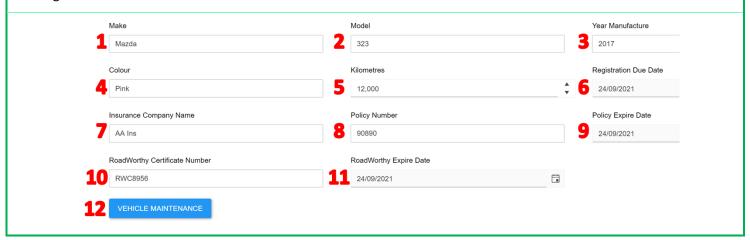
Click +ADD FILE to add documents and use the Action buttons to change as required.

These will now be available to users in the mobile app under **Documentation/Lift Equipment & Vehicle Documents**



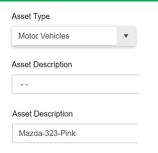
D. Motor Vehicles & Trailers

- 1. Make Brand of the vehicle (Ford, Mitsubishi, Dodge, Mazda, etc.
- 2. Model Name of the Vehicle (Pajero, Prado, Land cruiser, etc)
- 3. Year of Manufacture What year was it made
- 4. Colour Colour of the vehicle, refer to registration papers if required.
- 5. Kilometres –odometer reading when asset acquired optional field.
- 6. Registration Due Date select from date picker (if road registered)
- 7. Insurance Company Name Name of insurer
- 8. Policy Number insurance policy number
- 9. Policy Expiry Date date insurance policy expires
- 10. Roadworthy Certificate certificate number (if applicable)\
- 11. Roadworthy Expiry Date date roadworthy expires (if applicable)
- 12. Once the item is complete you can click the <u>Vehicle Maintenance</u> button to add the asset to the "Maintenance Register".



The Asset Description will be blank when you select Motor Vehicle as the asset type.

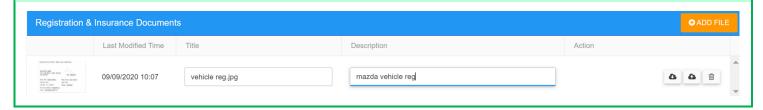
Once you have completed the Make, Model & Colour fields these will create the description as per below



Registration and Insurance Documents can be added in the section below.

Click +ADD FILE C to add documents and use the Action buttons to change as required.

These will now be available to users in the mobile app under **Documentation/Lift Equipment & Vehicle Documents**.

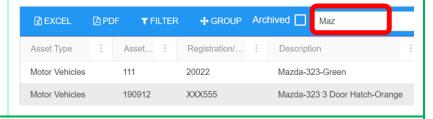


Where an asset has been assigned to a Staff Member they can view it in the mobile app in Registers/Plant & Equipment.

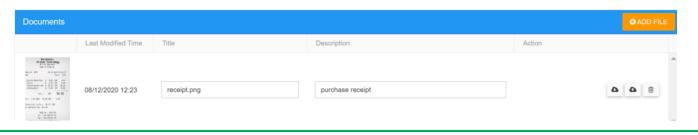
They can also book, collect and return Shared Plant & Equipment on the mobile app.

NOTES:

- Assets can have as many maintenance items as required, these can be reoccurring or one-off and can be added directly to the **Maintenance Register**.
- Click these links to see how to add **Safety Data Sheets** and **Equipment Manuals**.
- Typing in the Search Box on the grid page will help you quickly find a particular asset.
- You can also use the <u>filters</u> to find items and export lists.



Click +ADD FILE if you need to upload other documents for this asset.
 Use the <u>Action</u> buttons to change as required.



Scrolling past documents will show you a full list of tasks completed for this asset i.e. maintenance, testing, & repair history, daily plant inspections etc. Maintenance, Repair & Testing History ThirdParty MaintenanceType Vehicle Maintenance Type Maintenance Description Odometer Reading Completed Date ServiceNote Super Women Vehicle Maintenance Oil Check 35869 12/02/2020 Q Log Book Maintenance Good Plant & Equipment Register Name of Repairer Fault / Damage Repairs Required Repair Date Asset No : 2 , Reg No : 2ht , Description : Ferguson T-20 Fixit Better Ltd seat broken Glued it together 13/09/2020 Asset No : 2 , Reg No : 2ht , Description : Ferguson T-20 Fixit Better Ltd Top oil up Completed 23/09/2020 Signed Off Description Registration/Serial No Date & Time Inspected Ferguson T-20 2 2ht 23/09/2020 07:26 Kermit Frog \checkmark Q



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May-23