



Maintenance Register

There are 6 different types of maintenance. Items can be added when creating an assets from the [Plant & Equipment Register](#) by clicking the blue boxes or manually as per below.

A. Creating New Items:

From Registers/Maintenance/Maintenance Register click **+ADD NEW**.

1. Select Maintenance Type.
2. Select the item from the Plant & Equipment register.
The assets displayed will depend on the maintenance type selected.

The screenshot shows the 'Maintenance Register' page. On the left, the 'Maintenance Type' dropdown menu is open, with 'Plant & Equipment Maintenance' selected and highlighted in blue. A red number '1' is next to the dropdown. On the right, the 'Plant & Equipment Register' list is displayed, showing several assets with their details. A red number '2' is next to the list.

3. Selected Inspected By Staff or Supplier.
4. When Staff is selected choose from the list.
5. If there is an internal checklist to complete for the task select one from the list – see notes.
6. When Supplier is selected choose from the list.
Use the + to add [new suppliers](#)
7. Select the Responsible Staff member.
8. Sign Off will be ticked once the task is completed on the mobile app.

The screenshot shows the maintenance form. It includes fields for 'Inspected By' (radio buttons for Staff and Supplier), 'Staff' (dropdown menu), 'Supplier' (dropdown menu), and 'Responsible Staff' (dropdown menu). There are also checkboxes for 'Sign Off'. Red numbers 3 through 8 indicate the selection steps for each field.

See sections B to G below for each maintenance type. Each task can have documents added as per **section H**.

9. Tick the "Archived" box to show tasks that relate to Plant & Equipment that is non-current i.e. sold, destroyed etc.
10. Tick the "Signed Off" box to show tasks that have been completed.
11. Use the Filters, Group & Search boxes to create lists that can be exported to Excel or PDF.

The screenshot shows the Maintenance Register table. The table has columns for Maintenance Type, Due Date, Assigned To, Supplier, Description, Asset No, Regi..., and Sign Off. The 'FILTER' and '+ GROUP' buttons are highlighted with red boxes and red numbers 8 and 9 respectively. The 'EXCEL' button is also highlighted with a red number 10.

Maintenance Type	Due Date	Assigned To	Supplier	Description	Asset No	Regi...	Sign Off
Fire Equipment Maintenance	20/04/2021	George Foreman	Fixit Better Ltd	Fire Hose Class D	12341	ES345	<input type="checkbox"/>
Plant & Equipment Maintenance	16/06/2021	George Foreman	Fixit Better Ltd	Hitachi Skillsasw	4	4h	<input type="checkbox"/>
RCD Testing	11/09/2021	Mobile Craig		Ryobi ONE+ 18V 4.0Ah Lawn Mower	AU8956	AU8956a	<input type="checkbox"/>

12. Click Group and drag a column header into the grey space.

This will show the items group by the column selected. e.g. Maintenance Type for this example.

- a. Use the ▲ button to collapse any group.
- b. The ► button will redisplay the group.

The screenshot shows the Maintenance Register table with the 'Maintenance Type' column selected for grouping. The table is grouped by 'Maintenance Type'. Red numbers 10, a, and b indicate the group and collapse actions.

Maintenance Type	Due Date
Maintenance Type: Fire Equipment Maintenance	
Fire Equipment Maintenance	29/03/2021
Fire Equipment Maintenance	02/04/2021
Maintenance Type: Plant & Equipment Maintenance	
Maintenance Type: RCD Testing	
Maintenance Type: Test & Tag	

Contd/...

B. Calibrations:

1. If Staff is chosen you will need to select the appropriate licence.
2. When the item is assigned to a staff member you will need to select a Location.
3. Select the date for the next test.
4. Select how often a test is required.
5. Click SAVE.
6. Sign Off is ticked once task is completed.
7. Test Date populates when task is completed.
8. The result is entered on the mobile app and is Pass, Fail or Repair.
9. Calibration Result is entered on the mobile app.

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Maintenance Type	Date Added	Asset No
Calibrations	23/07/2021	1234
Registration/Serial No	Description	
zscdr	Test Asset	
Inspected By <input checked="" type="radio"/> Staff <input type="radio"/> Supplier	MaintenanceTemplate	
Staff	<input checked="" type="checkbox"/> Sign Off	
George Foreman		
License	Location	
1 GC45_ Electrical License	2 Plant Storage Shed #1	
Next Test Due Date	Test Interval	Test Date
3 04/01/2022	4 1 week	7 05/01/2022
Result	Calibration Result	
8 Pass	9 89012	

C. Fire Equipment Maintenance:

1. The type of Extinguisher will populate from the P&E Register.
2. Location will populate from the P&E Register.
3. Select the date for the next test.
4. Select how often a test is required.
5. Click SAVE.
6. Test Date populates when completed on mobile app.
7. The result is entered on the mobile app and is Pass, Fail or Repair.
8. Sign Off is ticked once completed on the mobile app.

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Maintenance Type	Date Added	Asset No
Fire Equipment Maintenance	27/09/2019	FE5623
Registration/Serial No	Description	
784890	Kitchen Extinguisher	
Inspected By <input type="radio"/> Staff <input checked="" type="radio"/> Supplier	Responsible Staff	
Supplier	David AASign	8 <input checked="" type="checkbox"/> Sign Off
Horts Fire Safety Training		
Extinguisher/Hose Reel Type	Location	
1 CLASS C - USED FLAMMABLE GASES	2 Lunchroom	
Next Test Date	Test Interval	Test Date
3 29/03/2021	4 6 months	6 29/03/2021
Result		
7 Pass		

Contd/...

D. Plant & Equipment Maintenance:

1. If Staff is chosen you will need to select the appropriate licence.
2. Type in a description of the maintenance to be completed.
3. Select date next test should be completed.
4. Select how often the maintenance should be done.
5. Click SAVE.
6. Completed Date will populate when the task is signed off on the mobile app.
7. Sign Off is ticked once the task is completed on the mobile app.

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Maintenance Type: Plant & Equipment Maintenance
Date Added: 4/11/2018
Asset No: 10

Registration/Serial No: SL5623
Description: Scissor Lift Orange

Inspected By: Staff Supplier

Staff: David AASign **7** Sign Off

License Qualification: **1** ELEC895623 _ Electrical License
Maintenance Description: **2** Check all electrical connections

Next Service Date: **3** 29/03/2021
Service Interval: **4** 3 months
Completed Date: **6** 24/03/2021

E. RCD Testing:

1. Location will populate from the P&E Register.
2. Select the next date for the RCD Test.
3. Select how often the item needs to be tested.
4. Click SAVE.
5. Test Date populates when completed on the mobile app.
6. Result is selected on the mobile app.
7. RCD Test Result is entered on the mobile app.
8. Sign Off is ticked when completed on the mobile app.

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Maintenance Type: RCD Testing
Date Added: 22/07/2019
Asset No: ACB560

Registration/Serial No: XY7819020
Description: Samsung 55in TV

Inspected By: Staff Supplier

Supplier: Blue Plumbing Supplies
Responsible Staff: David AASign **8** Sign Off

Location: **1** Lunchroom

Next Test Due Date: **2** 29/03/2021
Test Interval: **3** 6 months
Test Date: **5** 24/03/2021

Result: **6** Pass
RCD Test Result: **7** 908

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F. Test & Tag:

1. If Staff is chosen you will need to select the appropriate licence.
2. Location will populate from the Plant & Equipment Register.
3. Test & Tag Id No can be entered from the mobile app and will auto populate for future tasks.
4. Select date next test should be completed.
5. Select how often the task should be done.
6. Click  **SAVE**.

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Maintenance Type	Date Added	Asset No
<input type="text" value="Test & Tag"/>	<input type="text" value="25/08/2020"/> 	<input type="text" value="SM89"/>
Registration/Serial No	Description	
<input type="text" value="85236952"/>	<input type="text" value="Lenovo Table & Charger"/>	

Inspected By Staff Supplier

Staff

11 Sign Off

License	Location	Test & Tag Identification Number
1 <input type="text" value="ELEC895623 _ Electrical License"/>	2 <input type="text" value="Conference Rm2"/>	3 <input type="text" value="895623"/>
Next Test Date	Test Interval	Date Tested
4 <input type="text" value="29/03/2021"/> 	5 <input type="text" value="3 months"/>	7 <input type="text" value="24/03/2021"/>
Test & Tag Notes	Result	
8 <input type="text" value="Check cord"/>	9 <input type="text" value="Repair"/>	
Repair Description		
10 <input type="text" value="Repair cord"/>		

7. Date Tested will populate when the task is completed on the mobile app.
8. Notes are entered in the mobile app.
9. The result is entered on the mobile app and is Pass, Fail or Repair.
10. When Repair is chosen a Description must be entered.
11. Sign Off is ticked once task is signed off.

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G. Vehicle Maintenance:

1. Select the type of vehicle maintenance.
These can be changed in [Administration/Asset Management/Vehicle Maintenance Type](#)
2. If required type in a description.
3. Select the next service date.
4. Select how often the maintenance is required or select NA for a one off task.
5. Click **SAVE**.

The screenshot shows a web form for 'Maintenance Register'. At the top right, there is a red '5' and buttons for 'SAVE' and 'BACK'. The form fields are as follows:

- Maintenance Type:** Vehicle Maintenance
- Date Added:** 18/09/2019
- Asset No:** 789
- Registration/Serial No:** GOH123
- Description:** Toyota-Landcruiser-Pink
- Inspected By:** Staff (selected), Supplier
- Staff:** David AASign (dropdown), with a '9' callout and a checked 'Sign Off' checkbox.
- Vehicle Maintenance Type:** Tyre Rotation (dropdown), with a '1' callout.
- Maintenance Description:** Shift Front Tyres to Rear (dropdown), with a '2' callout.
- Odometer Reading:** 3,596 (input field), with a '6' callout.
- Next Service Date:** 29/03/2021 (calendar icon), with a '3' callout.
- Service Interval:** 6 months (dropdown), with a '4' callout.
- Completed Date:** 24/03/2021 (input field), with a '7' callout.
- ServiceNote:** Wear on inside rim front driver side. Need to check alignment (input field), with an '8' callout.

6. The Odometer reading is entered from the mobile app.
7. Completed Date will populate when the task is done on the mobile app.
8. Service Notes are entered on the mobile app.
9. Sign Off is ticked once task is signed off on the mobile app.

H. Attaching files and Emailing

1. Click **+ADD FILE** to upload any documents e.g. receipts, log book details, maintenance reports etc. These can also be uploaded from the mobile app.
2. To email these files click either **SELECT ALL** or tick the required box.
3. Click **EMAIL** – see below.
4. [Upload & download](#) files as required.

The screenshot shows a 'Documents' table with the following columns: Last Modified Time, Title, Description, and Action. A table with one row is visible:

Last Modified Time	Title	Description	Action
28/10/2021 06:49	2110 MBIE_inv_12718405.pdf	stuff	[Icons: Refresh, Copy, Delete, Select]

Callouts: '1' points to the '+ADD FILE' button; '2' points to the 'SELECT ALL' button; '3' points to the 'EMAIL' button; '4' points to the document row.

3. When you click email you can select from the following:
 - a. Type in the customer box and select as required.
 - b. You can now select from this customers contacts.
 - c. Select any staff members who you wish to send the document to.
 - d. Change the Subject field if required.
 - e. Click **SEND**

The 'Send Email' dialog box contains the following fields:

- Customer:** Purple Submarine Ltd (dropdown), with callout 'a'.
- Customer Contacts:** ROAD RUNNER - CRAIG.SMITH@SAFETYMINDER.COM.AU x (dropdown), with callout 'b'.
- Staff Contacts:** KERMIT FROG - ACCOUNTS@SAFETYMINDER.CO x (dropdown), with callout 'c'.
- Subject:** Documents for Vehicle Maintenance - AssetNo : AUG2408 , SerialNo : GrillM3 (input field), with callout 'd'.
- Buttons:** SEND (with callout 'e') and CANCEL.

NOTE: select customer and staff are both optional i.e. you can send an email just to a staff member or only select customer & contact.

Files can also be added in the task on the [mobile app](#).

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Task will need to be signed off in the Mobile App in [Registers/Maintenance Register](#)

NOTES:

- Where a template form is to be completed for the task then only forms that are locked with type P&E Maintenance selected will be displayed. Once the form is completed inside the task it will show in the documents section.

Documents					EMAIL	ADD FILE
	Last Modified Time	Title	Description			Action
	12/01/2022 10:33	P&E Maintenance	AA-PE01 - Vehicle Maintenance Check			
	12/01/2022 10:33	Maintenance	6h-Electrical Calibration Tool			

- When a service or test interval of NA is chosen the item will be treated as a one off.
- All other items will have a new task created using the [Service/Test Interval](#) + completed date and are assigned to the Maintenance Manager set in [Key Roles & Responsibilities](#).
e.g. 24/03/2021 + 6 months (180days) = 20/09/2021 for new task.
- Completed tasks can be viewed for each asset from the P&E Register by scrolling down.
Or by clicking the "Signed Off" box in the maintenance register section A#9 above.

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Asset Type: Plant | Asset No: ACB560 | Registration/Serial No: XY7819020 | Date Added: 22/07/2019

Asset Description: Samsung 55in TV

Maintenance, Repair & Testing History											
Staff	ThirdParty	MaintenanceType	License	Location	Test & Tag Identification Number	Date Tested	Test & Tag Notes	Result	Fail Description	Repair Description	Fail Status
Snow AAWhite		Test & Tag				22/07/2019	Samsung 55in TV				
Snow AAWhite		Test & Tag	JJ78456 _ Back Hoe License	CF Room 2	78900	01/06/2020	Ff	Pass			

Maintenance, Repair & Testing History											
Staff	ThirdParty	MaintenanceType	License	Location	Test Date	Result	Fail Description	RepairDescription	RCD Test Result	Fail Status	
Snow AAWhite	Blue Plumbing Supplies	RCD Testing	XS12356 _ Car license - Class C or 1		22/07/2019	Pass					Samsung 55in TV
David AASign	Blue Plumbing Supplies	RCD Testing	ELEC895623 _ Electrical License	Lunchroom	24/03/2021	Pass				908	

