PDS Idler Management

Training Overview for the iPad Application

PDSSOFTWARE

Using PDS Idler Management Software
- iPad version

Getting Started

Log in using the email address which was used to create your PDS account in the **Username** field. The password is the one that you set from the link that was emailed to you from PDS support. As a guide, your password will have at least six characters and a minimum of one upper case character, a lower case character and a numeral.

On the module screen, select the Idler Management image. Please note, the modules available to you will be coloured. Any inaccessible modules will be greyed out. In the example to the right, all modules are available to the logged in user.


Synchronising

Idler Management will synchronise automatically on iPads but it is important to manually synchronise data, particularly after completing an inspection.

To synchronise, tap on the cog icon in the bottom right of the screen. A **Settings** popup will appear. Tap on **Force Sync**. If the iPad is not connected (via 3G or WiFi) an **Offline** popup will appear.

Note: If an inspection is to be carried out offline due to no mobile service, before leaving service area log on to the iPad and select either Asset or Idler Management to the allow initial sync to occur.
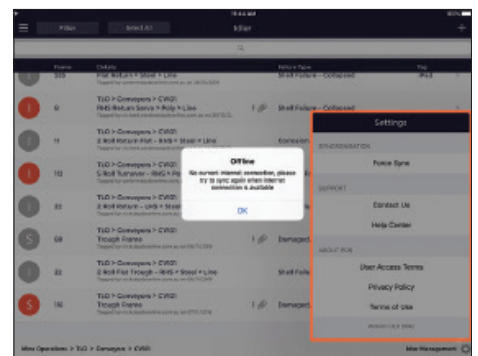
When logging on, the navigation tree will automatically appear. To access it from the dashboard or when it's not displayed, tap on the three lines on the top left corner to bring up the left slider navigation pane.
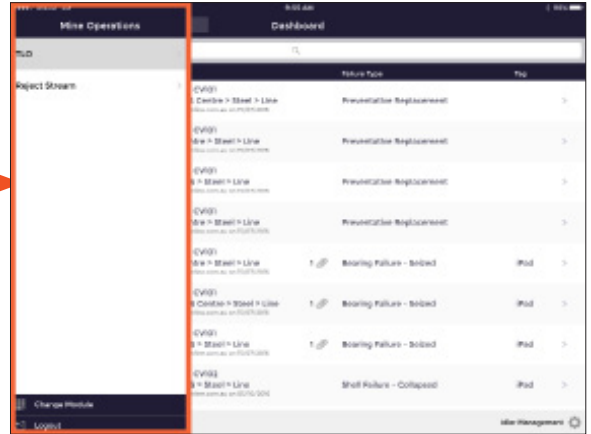
Select the required area/conveyor to bring up the **Idler Dashboard**.
Note - Idler Management can also be accessed through Asset Management. As above, follow the navigation tree to the required conveyor and select **Idler Management** in the **Quick Actions** menu.
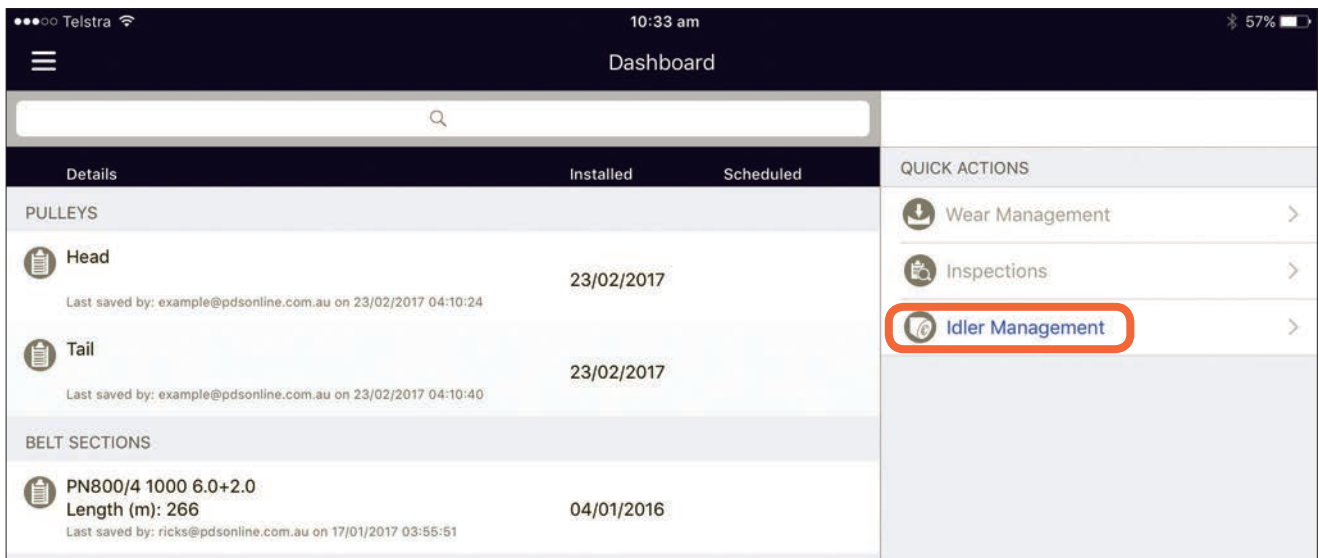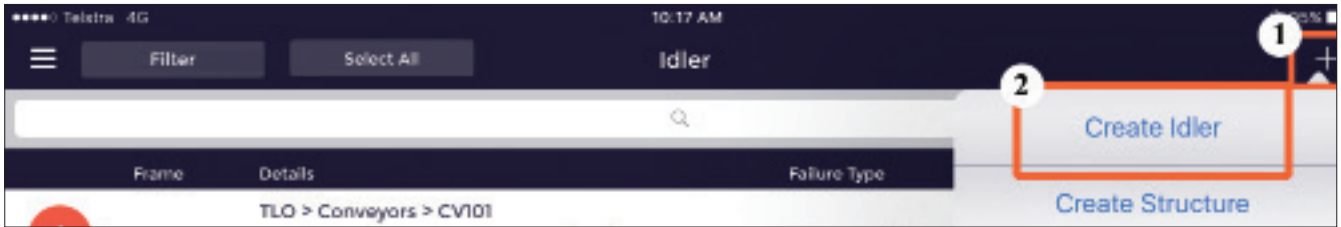

The dashboard represents all outstanding idler/structure failures. If **I** (Idler) or **S** (Structure) symbols are red, they are deemed to be at risk. It can also be filtered by At Risk or Attachment.
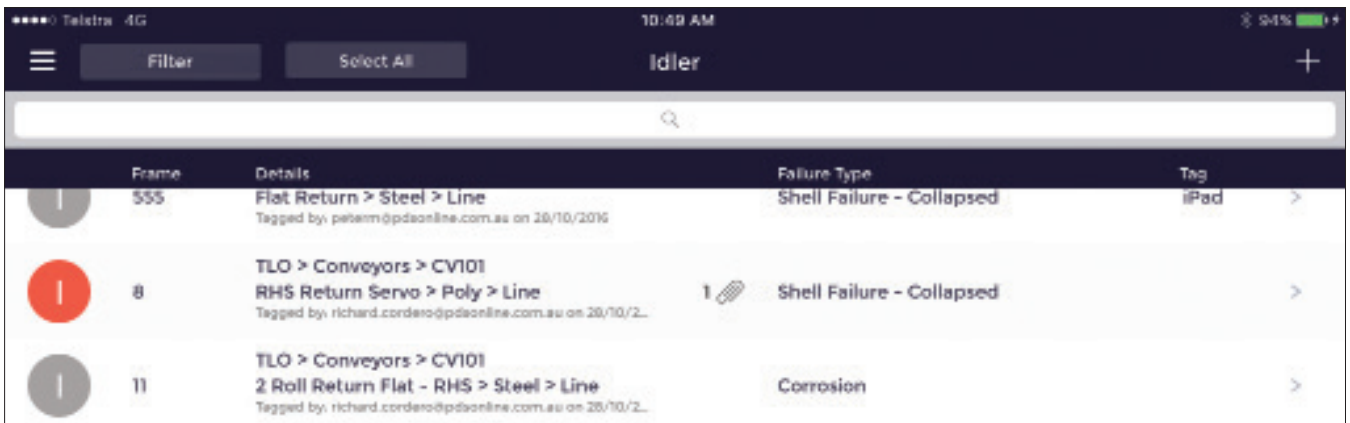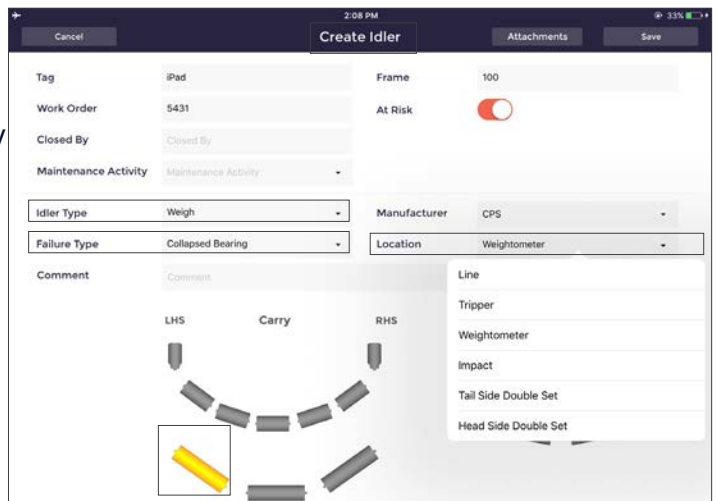
Creating an Idler Failure

Tap on the ✚ (1) sign then select **Create Idler (2)** to create a new failure.

After selecting Create Idler the **Create Idler** screen will appear. Complete the mandatory fields. Mandatory fields include **Idler Type**, **Failure Type** and **Location**. It is also necessary to select a position on the frame graphic. All other fields are optional.

A warning will appear if the mandatory fields have not been completed.

Please note, any fields which have a drop-down list can be configured in the web version if required.

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Using the 'Frame From' and 'Frame To' fields, users can now add multiple idler failures between frames along a single conveyor.	**At Risk** can be selected as required to highlight any idler or structure record which is determined to have a higher potential to cause severe damage or downtime.	Attachments such as photos of the failure, can be added at anytime by tapping on the **Paper Clip** icon on the top right of the screen.	Remember to save the record by tapping on the **Tick** icon on the top right of the screen.

Creating a Structure Failure
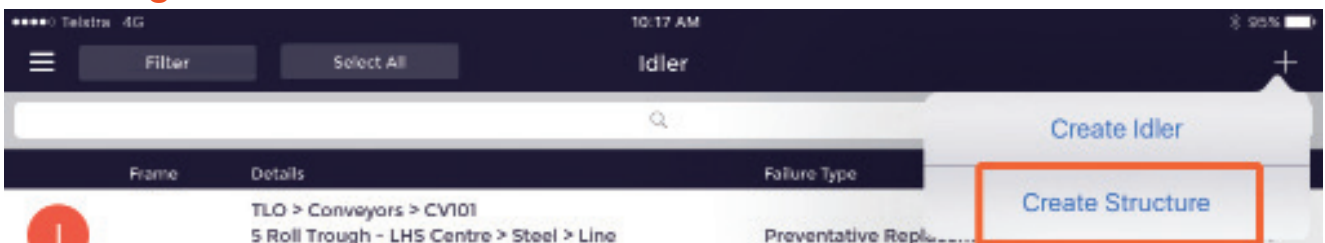
To create a structure failure, follow the same process as creating an idler failure. The save, attachment, voice-to-text functionality is exactly the same. The main difference between creating an idler failure verses a structure failure is that, for a structure failure, the only mandatory fields are **Structure Type** and **Failure Type.** All other fields are optional.

Editing an Idler or Structure Failure

Tap anywhere along the row of an existing failure, *except for the I or S icon*, to edit it.
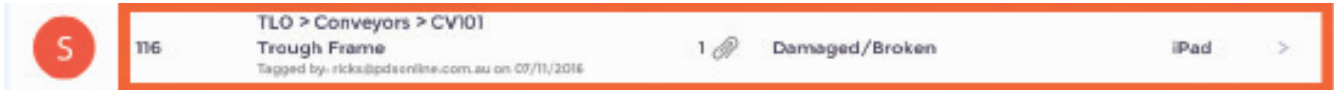
The pop-up screen which will appear will look exactly the same as the Create Idler (or Create Structure) screen. Update the fields, add attachments and add comments as necessary then save. Any non-mandatory fields have a drop down where "None" can be selected to enable editing for previously selected options.
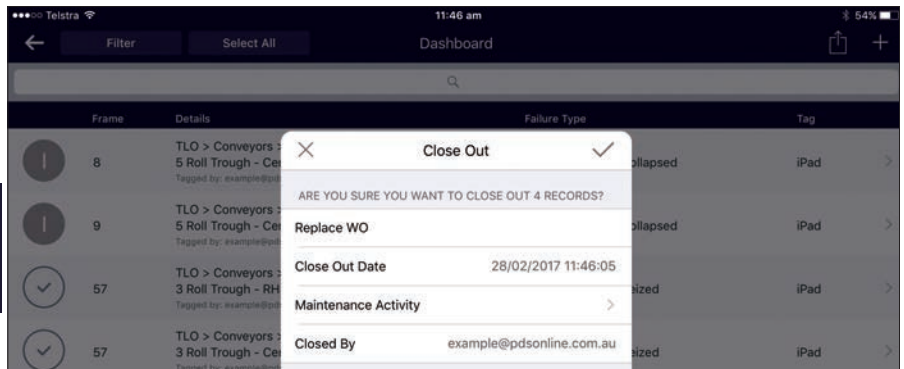
Closing Out Failures

There are two options when closing out replaced idler failures.
Firstly, within the Idler Dashboard, tap on the corresponding I or S symbol/s on the left side or **Select All**. Once the record/s have been selected, tap on the **Close Out** button which will appear on the top of the screen.

Alternatively if closing out a single record, swipe left on the record to expose the Delete, Close Out, Laid Out options. Select Close Out.
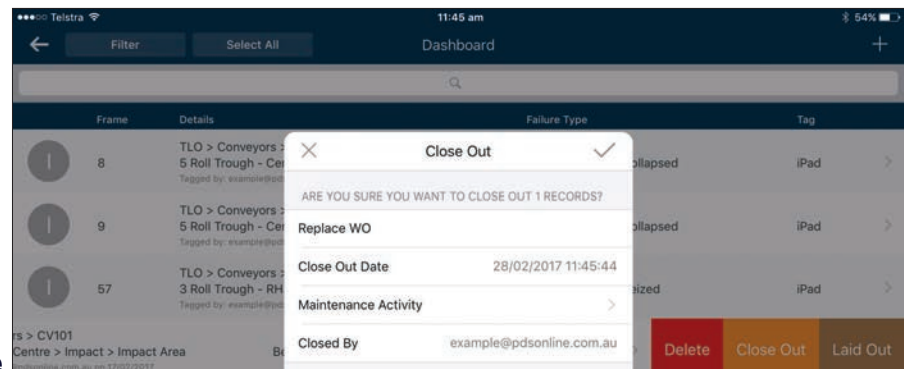
A pop-up window will appear asking you to verify the close out. At this time a Work Order and/or Maintenance Activity can be added. Tap on **OK** then **Save**.
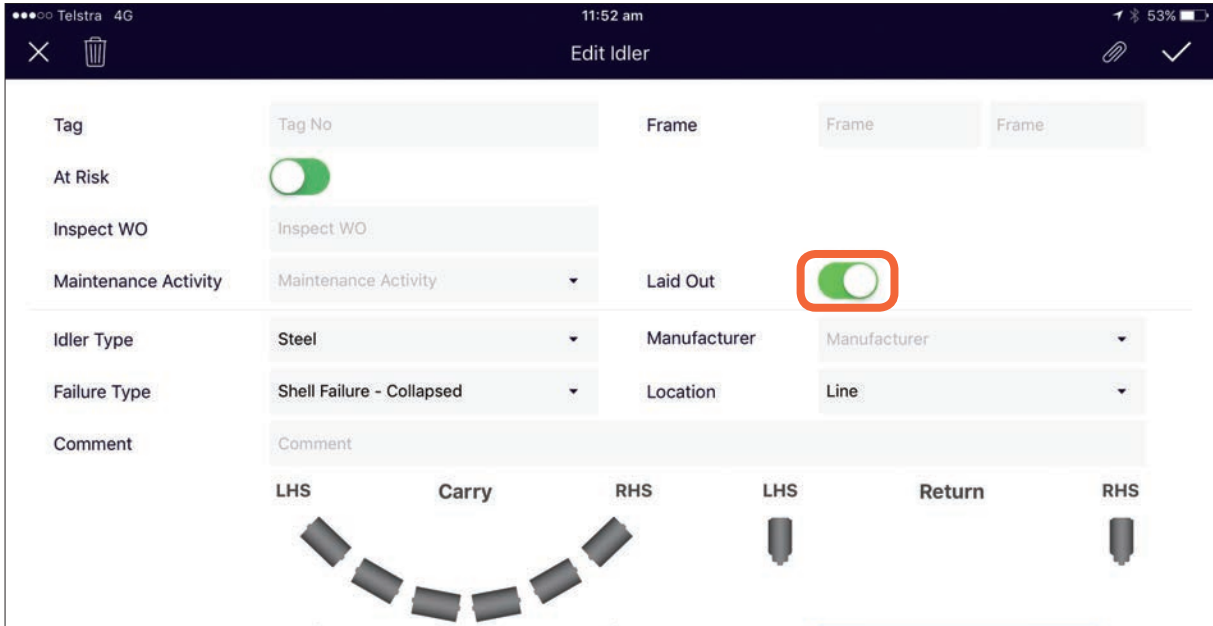
Deleting Idler Failures

To delete a record, select **Delete** after swiping left and confirm.
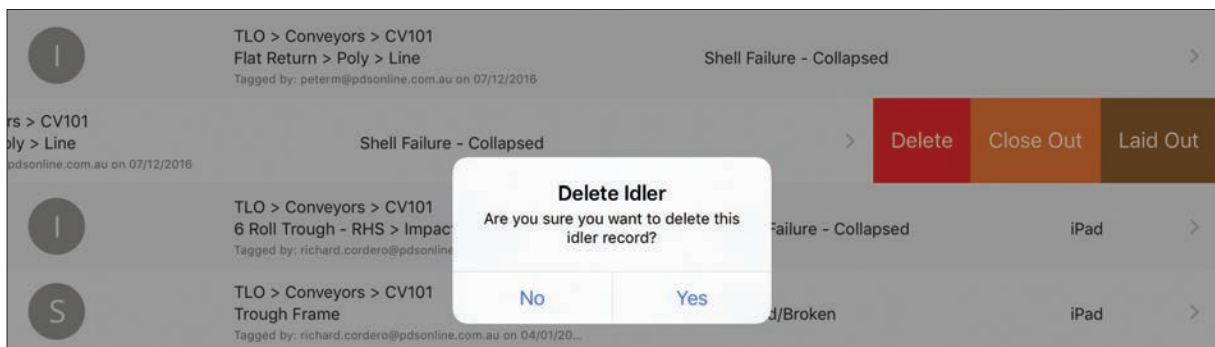
Marking Idlers as Laid Out

To select an idler as being **Laid Out** ready for replacement there are also two options. During the creation of the failure record or by tapping on an existing record, tap on the toggle to highlight green next to **Laid Out**. Select the **Tick** to save.

Alternatively swipe left on the record and select the **Laid Out** button, and select **Yes** to save.
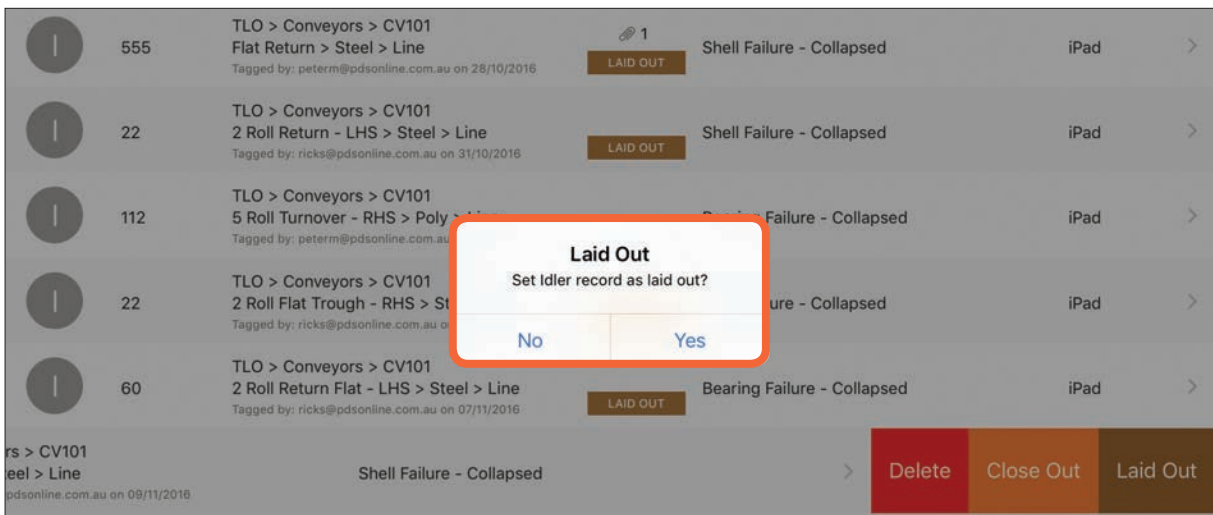
If the brown **Laid Out** indicator is showing on the failure record, but you wish to remove it, tap on the record and within the **Edit** screen deselect the **Laid Out** toggle. Select the **Tick** to save.
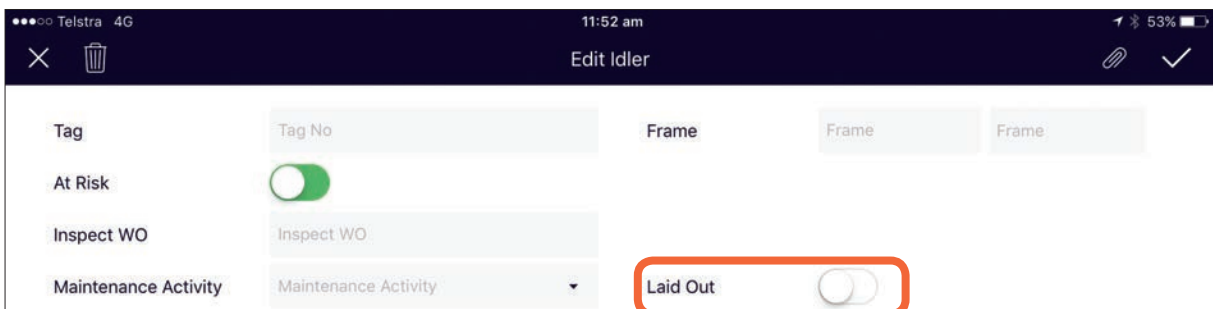
PDS Support

We are committed to client support. We know that by supporting our clients, they can get the best from our software – it's that simple. We deliver 24-hour access to our technology through a securely hosted cloud environment, which includes regular product updates.

The PDS software is licensed on a per module, per site basis. The modular structure of PDS Software provides clients with the freedom to select only the modules that relate to their particular requirements. This condition management solution is web-based supporting multiple browser types and device types. An optional ruggedised version is available to best suit the user environment.

The PDS Software is designed to operate in the harshest of environments on ruggedised handheld devices or tablets and current computer systems.
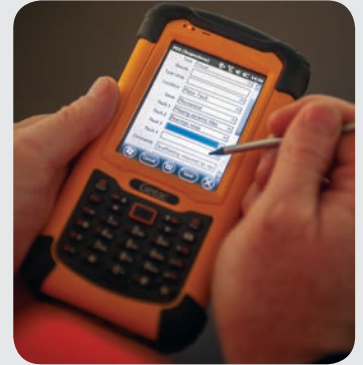
Getting Access

To access the mobile or desktop versions of the PDS software, you must have a user account. User accounts can only be requested by an authorised site representative. Instructions will be sent to your work email once the request is received.

Quick Reference

PDS customers have full access to an extensive online library of technical support articles, first-time user guides and FAQs at our dedicated support site support.pdsglobal.com

User Roles

When a PDS user account is set-up, the user is given a "role" which determines their level of access to specific PDS software modules. There are three user roles available Read-Only Users, Standard Users and Power Users.

Read-Only Users have restricted use of the PDS software. They can access the reports that are generated within specific PDS modules but cannot enter or change data.

Standard Users have access to the required PDS modules and reports but cannot access any of the associated administration menus.

Power Users have full access to the required PDS modules and reports as well as all administration functions including adding/editing assets, the software hierarchy and node values.

Synchronising

When using the PDS applications on PDAs in the field, it is important to synchronise data before and after use.

Synchronisation will ensure that the latest data is available on the device during an inspection and the latest inspection records are available to non-users of the device or users of other devices.

Contacting PDS

Support requests can be emailed to support@pdsglobal.com

Alternatively, the **Help** tab on the right hand side of every page on the PDS support website allows our customers to contact our team for assistance and information.

The **Help** tab can also be used by authorised site representatives to request login access to the PDS software.

About PDS

To ensure the best life-cycle outcome of assets, Productivity Development Solutions' comprehensive maintenance approach incorporates Maintenance Strategy Analysis, RCM Facilitation and innovative software including, Asset Management, Work and Inspections, Idler Management, Wear Management and Complex Mapping.

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