



iPDS Asset Management

Training Overview for Inspections on the iPad



Using PDS Asset Management Software - Inspections

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 Asset 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.

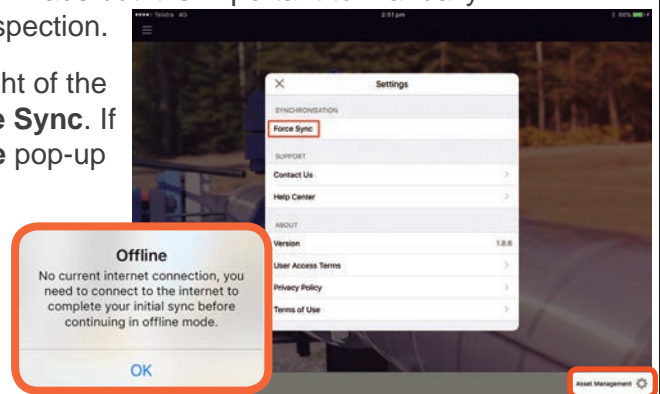


Synchronising

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

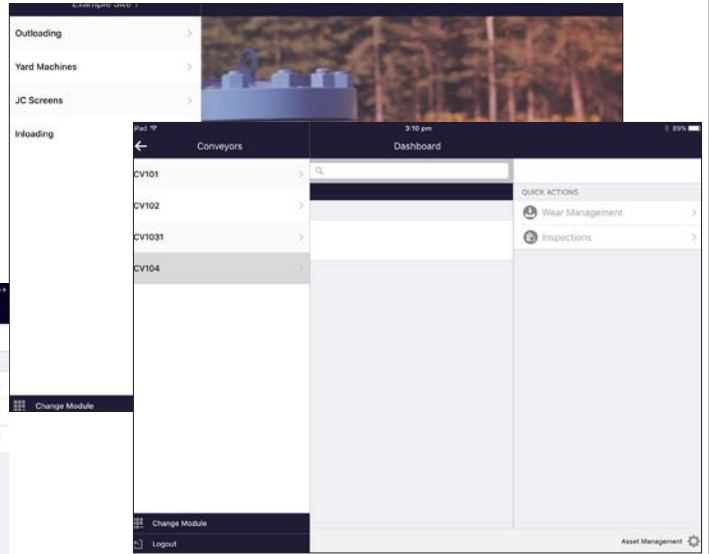
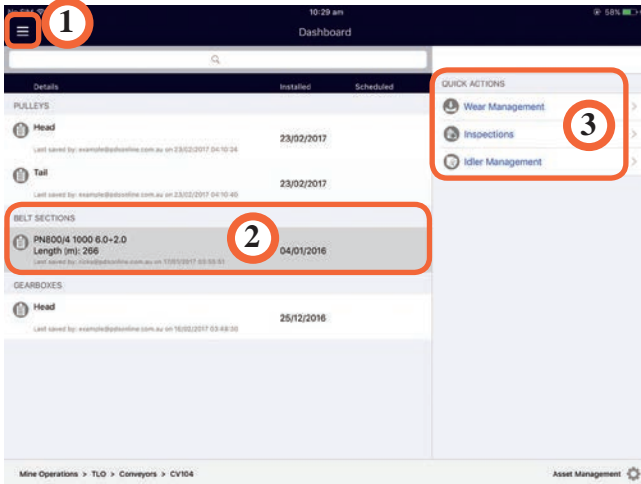
To synchronise, tap on the cog icon in the bottom right of the screen. A **Settings** pop-up will appear. Tap on **Force Sync**. If the iPad is not connected (via 3G or WiFi) an **Offline** pop-up will appear.

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 the Asset Management module to the allow initial sync to occur.



Navigating Asset Management

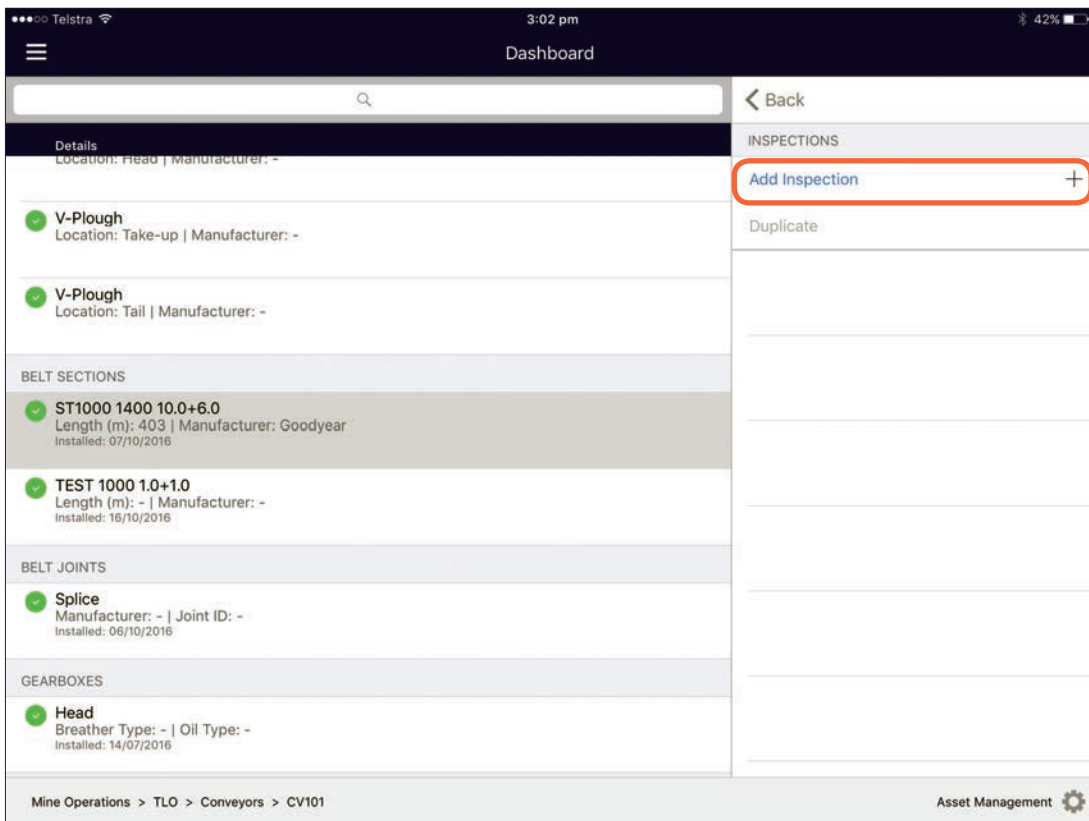
When logging on, the navigation tree will automatically appear. To access it from the dashboard or when it's not displayed, tap on the three lines on the top left corner (1) to bring up the left slider navigation pane. Follow the navigation tree to the required area/conveyor to bring up the Asset **Dashboard**.



On the Asset **Dashboard**, select the required asset to be inspected(2). Under the **Quick Actions** pane on the right side (3), the **Inspections** button will change to blue, enabling it to be selected.

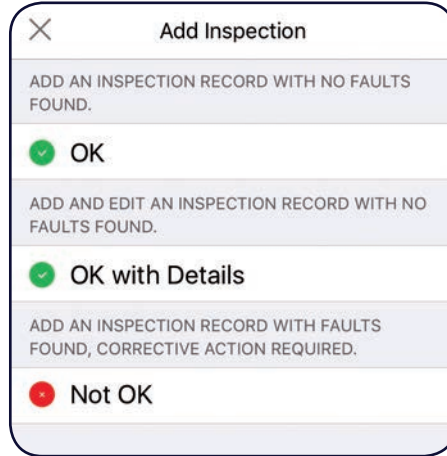
Creating an Inspection Record

Select **Add Inspection** in the Inspections panel.

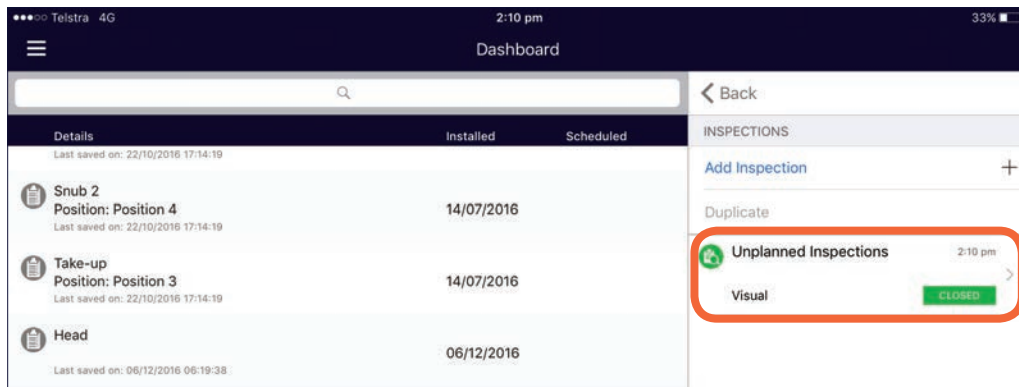


Creating an Inspection Record (cont.)

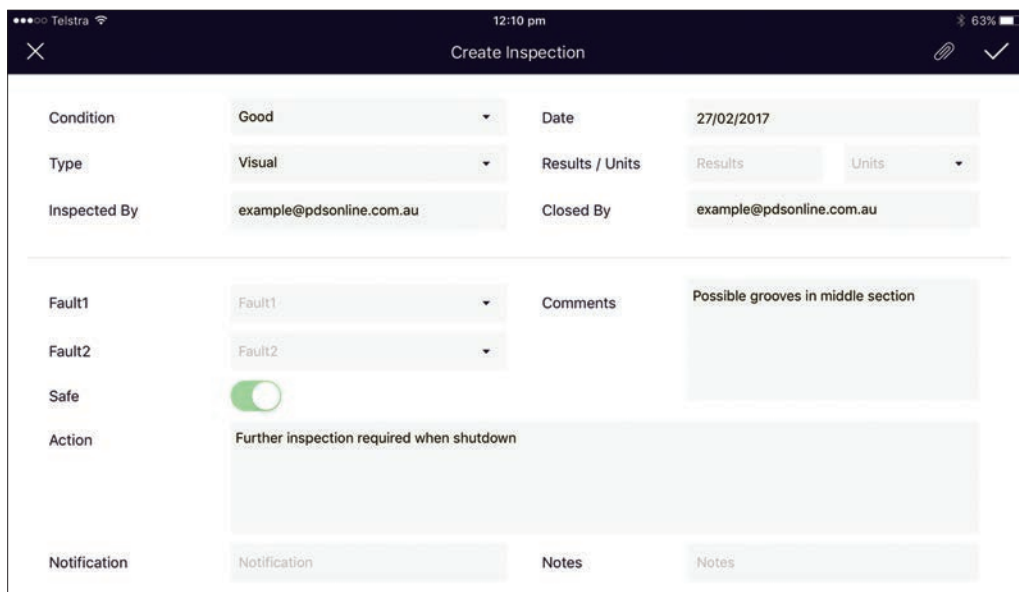
There are three options to choose from on the **Add Inspection** Pop-up.



Tapping on **OK** will save a good condition report with the date of the inspection.



Tapping on **OK with Details** allows comments to be added and photos can be attached.



Creating an Inspection Record (cont.)

Tapping on **Not OK** allows condition, results, fault codes, photo attachments, comments and actions to be saved as an inspection record. All boxes with the drop down arrow need to be configured in the Web Version. To add information to text fields, tap on the field and type in text. It is mandatory to add a fault code from the drop downs to create the record. Also next to **Safe**, the **At Risk** toggle is set as green as a default. Tap on it to change it to red if the issue renders the equipment at risk. Once completed select the **Tick** to save.

The screenshot shows the 'Create Inspection' form with the following details:

- Condition:** Out of Spec
- Type:** Visual
- Inspected By:** example@pdsonline.com.au
- Date:** 23/02/2017
- Results / Units:** Results, Units
- Closed By:** Closed By
- Fault1:** Lagging delaminated
- Fault2:** Fault2
- Safe:** (Green)
- Comments:** Lagging delaminating on RHS edge of pulley
- Action:** Continue to monitor for replacement
- Notification:** Notification
- Notes:** Notes

Attaching a Photo to an Inspection Record

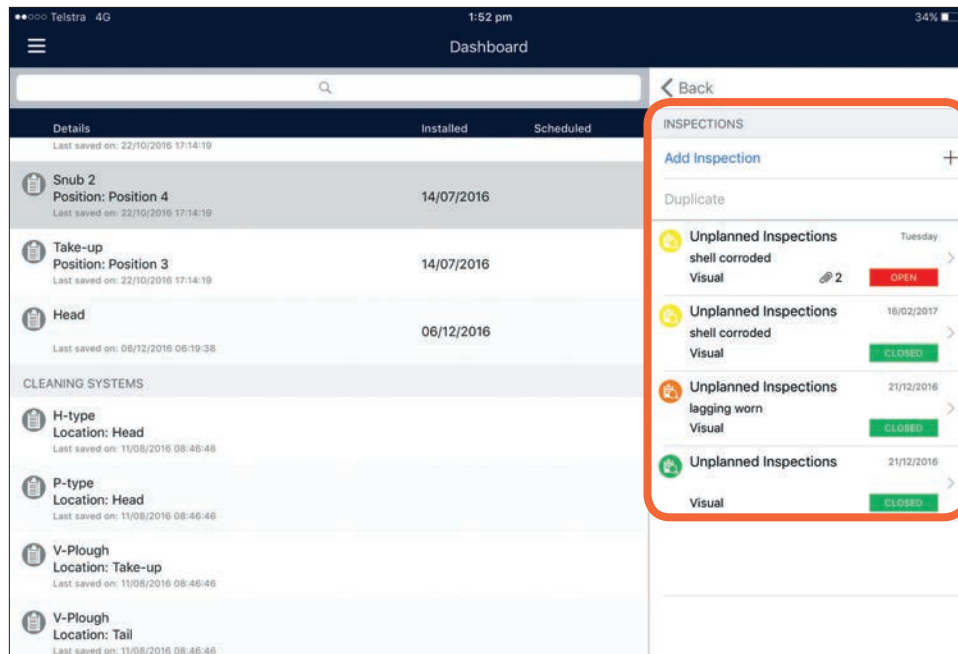
On either the **Create** or **Edit Inspection** screen, select the **Paperclip** icon on the top right. Tap on the **+** and select **Take Photo**. Once photo is captured, either **Use Photo** or retake if required. Select the **Tick** to save.

This screenshot shows the 'Create Inspection' form with the Paperclip icon in the top right corner highlighted by a red box, indicating the next step in the process.

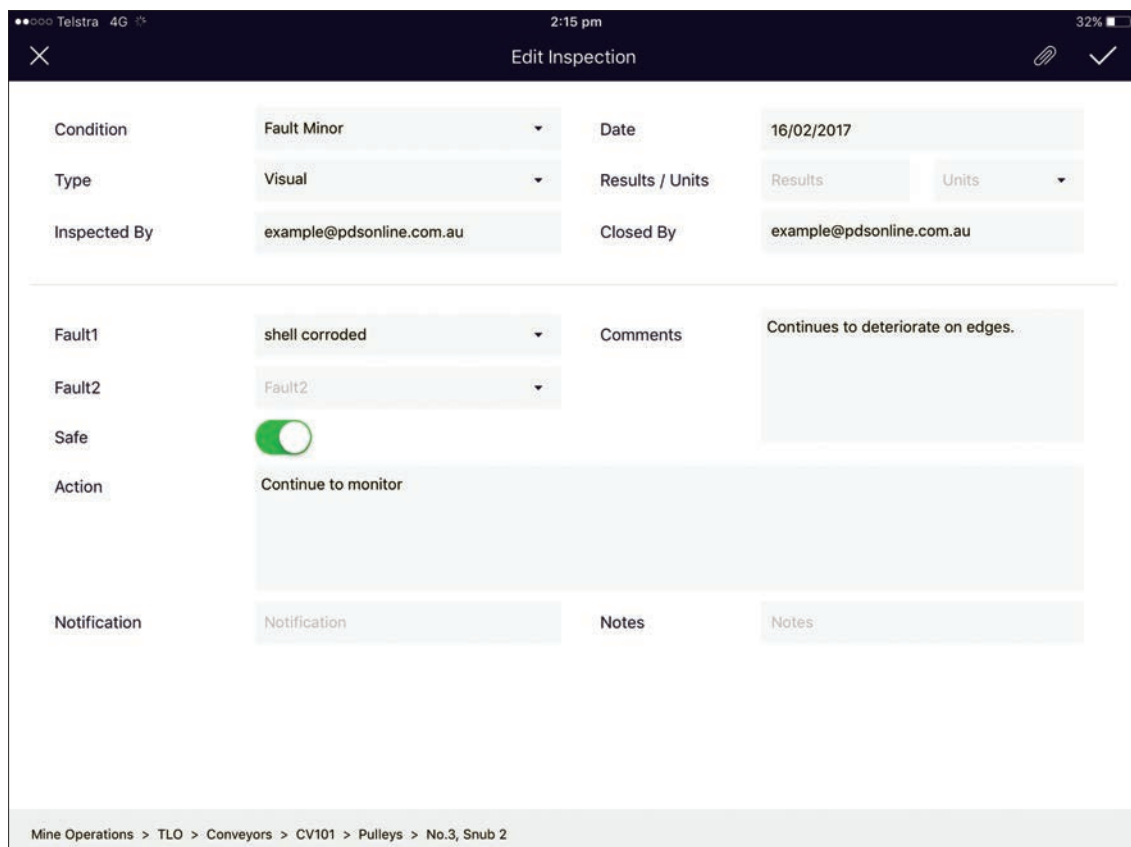
The screenshot shows the 'Attachments' screen with a large '+' icon in the center. Below it are two options: 'Take Photo' and 'Choose Existing Photo'.

Viewing Existing Inspection Records

If existing records have been created they will appear in the **Inspections** panel. To view an existing inspection record tap on the **Unplanned Inspections** record.



If there are no changes, select the **X** on the top left to return to **Inspections** menu. Most fields can be edited. Select the **Tick** on the top right to re-save any changes.



Duplicating Existing Inspection Records

If the Inspection record has not changed and you wish to create a record with the current inspection date, hold your finger down on the record until the Duplicate button is activated (shows as blue). Select **Duplicate**, and a pop-up will appear on the screen. Select **Yes** to create the duplicate record or **No** to cancel. The Inspection record will now be seen with today's date. Further additions to text can be made or a photo added. Select the Tick to save.

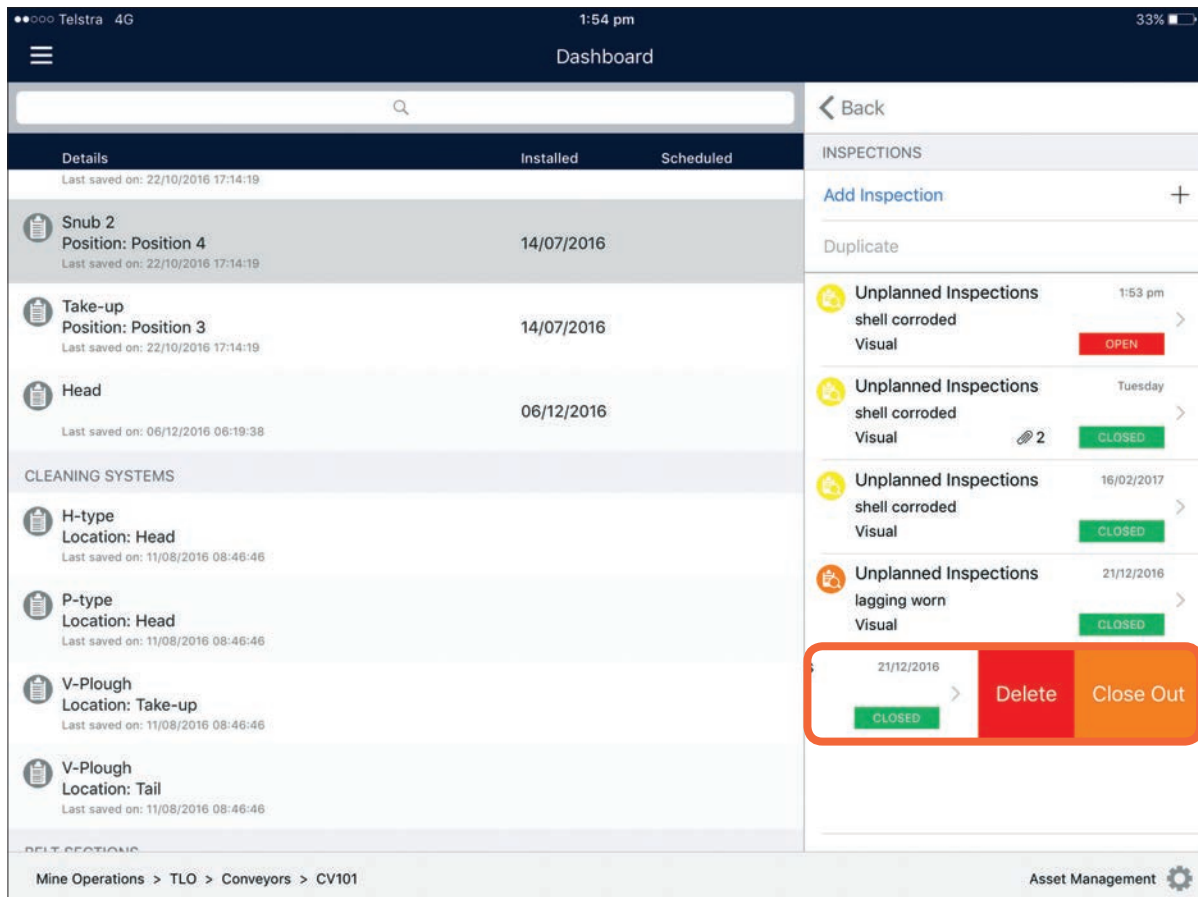
The screenshot shows the 'Dashboard' app interface. On the left, there is a list of inspection records under the 'Details' tab, with columns for 'Installed' and 'Scheduled'. The records include 'Snub 2' (Position: Position 4, 14/07/2016), 'Take-up' (Position: Position 3, 14/07/2016), and 'Head' (06/12/2016). Below this is a section for 'CLEANING SYSTEMS' with records like 'H-type' (Location: Head, 11/08/2016) and 'P-type'. On the right, there is a sidebar menu with 'INSPECTIONS', 'Add Inspection', and 'Duplicate'. A pop-up dialog titled 'Duplicate Record' is centered on the screen, asking 'Continuing will close out this record and create a duplicate record with todays date, do you want to continue?' with 'No' and 'Yes' buttons.

The screenshot shows the 'Create Inspection' form. It has a dark header with a close button (X), the title 'Create Inspection', and a checkmark icon. The form fields are as follows:

- Condition:** Fault Minor (dropdown)
- Date:** 22/02/2017
- Type:** Visual (dropdown)
- Results / Units:** Results (input), Units (dropdown)
- Inspected By:** example@pdsonline.com.au
- Closed By:** Closed By (input)
- Fault1:** shell corroded (dropdown)
- Comments:** Continues to deteriorate (text area)
- Fault2:** Fault2 (dropdown)
- Safe:** (toggle)
- Action:** Continue to monitor (text area)
- Notification:** Notification (input)
- Notes:** Notes (input)

Closing Out and Deleting Inspection Records

Tap on relevant equipment and select **Inspections**. Swipe left on the inspection record to be closed out or deleted to expose the **Delete** and **Close Out** buttons.



Select **Close Out** and add **Work Order** number if required, tap on the **Tick** to save. The record is now closed out and saved in the equipment history.

✕
Close Out Inspection
✓

ARE YOU SURE YOU WANT TO CLOSE OUT THE SELECTED INSPECTION?

Work Order 12345

Close Out Date 22/02/2017 13:54:19

Closed By example@pdsonline.com.au

Delete Inspection

Are you sure you want to delete this inspection record?

No
Yes

To delete a record, select **Delete**, then **Yes** on the pop-up. The record is now deleted from the system.

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.

**Productivity Development
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