PDS Software Quick User Guide

PDS Idler Management - iPad App

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. (**Note** - Idler Management can now also be accessed through Asset Management).

Navigating Idler 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 to bring up the left slider
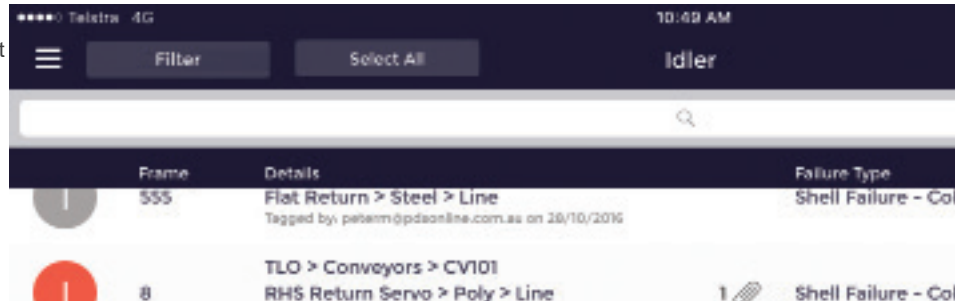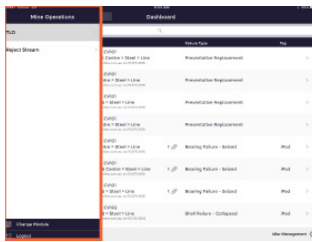
navigation pane. Select the required area/conveyor to bring up the Idler dashboard. The dashboard represents all outstanding idler/structure failures. If **I** (Idler) or **S** (Structure) symbols are red, they are deemed to be at risk. It can also be filtered by At Risk or Attachment.

Creating an Idler or Structure Failure

Tap on the **+** sign **(1)**, then select **Create Idler (2)** or **Create Structure (3)** to create a new failure. A **Create Idler (or Structure)** screen will appear. Complete the mandatory fields. Mandatory fields include **Idler Type**, **Failure Type** and **Location or Structure Type and Structure Failure Type**. It is also necessary to select a position on the frame graphic. All other fields are optional.
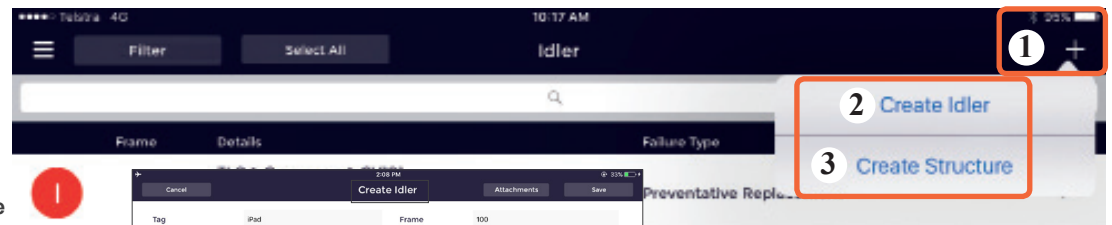
A warning will appear if the mandatory fields have not been completed.
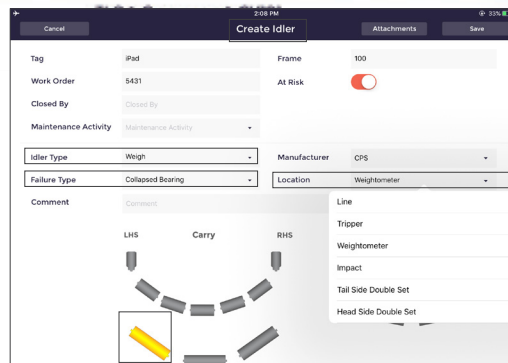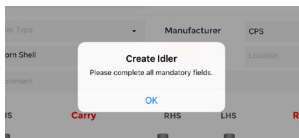
Please note, any fields which have a drop-down list can be configured in the web version if required.

| 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 any time 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. |

Editing an Idler or Structure Failure
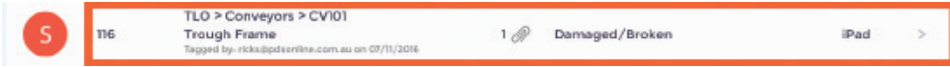
Tap anywhere along the row of an existing failure, *except for the I or S icon*, to edit it. The pop-up screen which will appear will look exactly the same as the Create Idler (or Create Structure) screen. Update the fields, add attachments and add comments as necessary then save.

Closing Out or Deleting Failures

Once a failure record has been deemed to be rectified it can be closed out by swiping left on the record on the idler dashboard.
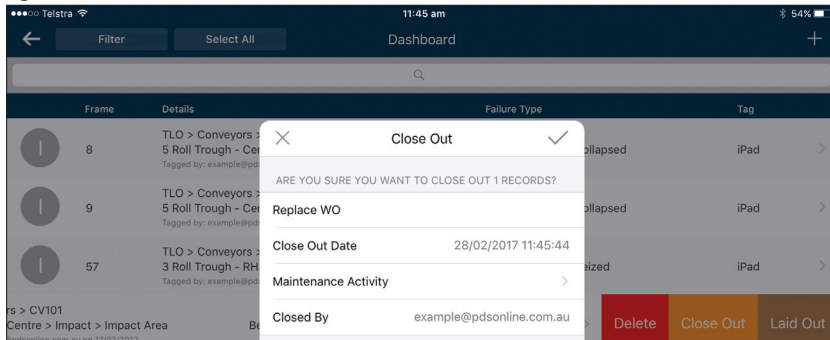

Bulk failure records can be closed out by tapping on the corresponding **I** or **S** symbols, or tap **Select All**. Tap on the **Close Out** icon at the top of the screen, and tap on the **Tick** icon in the pop up.

To delete a record, select **Delete** after swiping left, and then tap **Yes** to confirm.

Marking Idlers as Laid Out

To select an idler as being **Laid Out** ready for replacement either (when creating or editing a record) tap on the toggle to highlight green next to **Laid Out**, or swipe left on the record and select the **Laid Out** button. Tap on the **Tick** or **Yes** respectively to save the record.
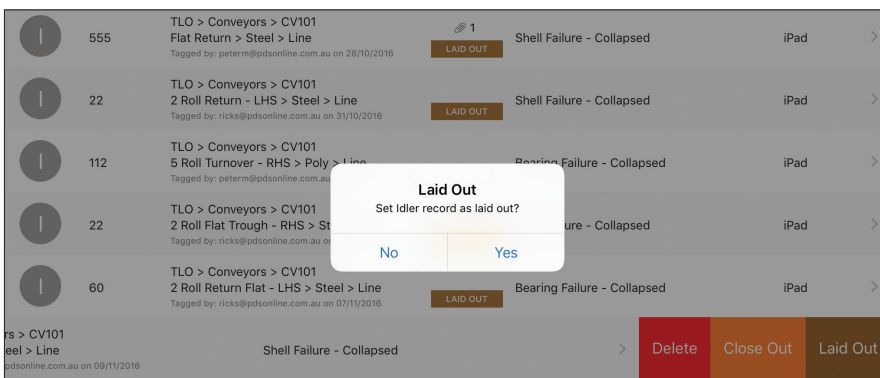
If the brown **Laid Out** indicator is showing on the failure record, but you wish to remove it, tap on the record and within the **Edit** screen deselect the **Laid Out** toggle. Select the **Tick** to save.
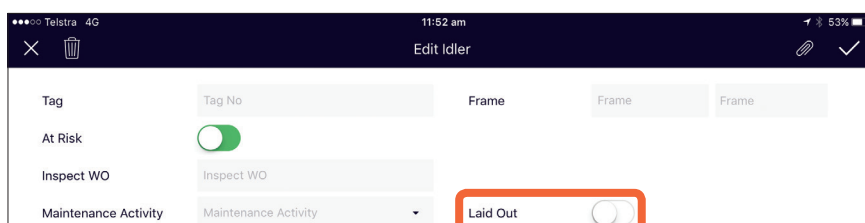
Quick Reference

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

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 author-ised site representative. Instructions will be sent to your work email once the request is received.

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.

Forgotten your password?

If you have forgotten your password, you can request a new password by going to https://software.pdsglobal.com and clicking on the Forgot my password link. As a guide, your password will have at least 6 characters and at least one upper case character, a lower case character and a number.

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.

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.