PDS SOFTWARE

March 2018

PDS Software Quick User Guide

PDS Planned Inspections on the iPad

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 Planned Inspections image.

Synchronising

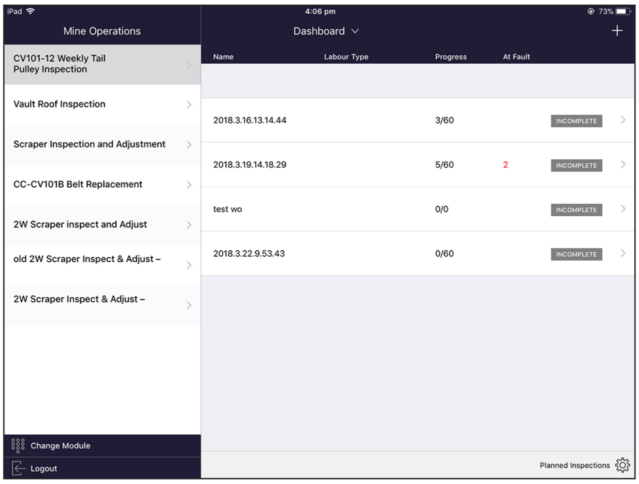
Planned Inspections will synchronise automatically on iPads but it is important to manually synchronise data, particularly after completing an inspection.

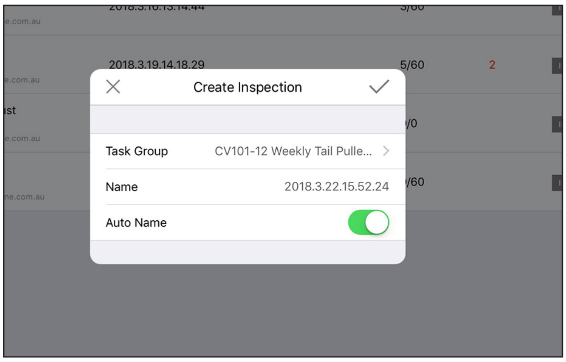
To synchronise, tap on the cog icon in the bottom right of the screen and a **Settings** pop-up will appear. Tap on **Force Sync**. If the iPad is not connected (via 3G or WiFi) an Offline pop-up will appear.

Navigating Planned Inspections

A planned inspection is made up of a series of tasks that are configured in the PDS Work Management module in the web software. These are shown on the iPad as a list of task groups in the navigation panel on the left. The dashboard on the right shows all the inspections that have been created for each task group. Tapping in the dashboard area will collapse the navigation panel. The inspections on the dashboard are shown as being either complete or incomplete. A filter can be applied to show either complete inspections or incomplete inspections.

The dashboard can also show At Fault inspections, which is a combined view of both planned and unplanned inspections.





Creating an Inspection

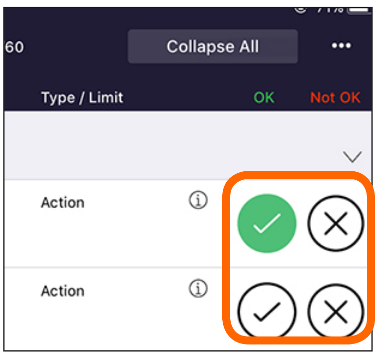
To create a new inspection, tap on the **+** symbol at the top of the dashboard. Tap on **Task Group** to select the group you want to create the inspection from. Name the inspection, or use the Auto Name toggle. It uses the date and time to create the name. Tap on the tick to create the inspection.

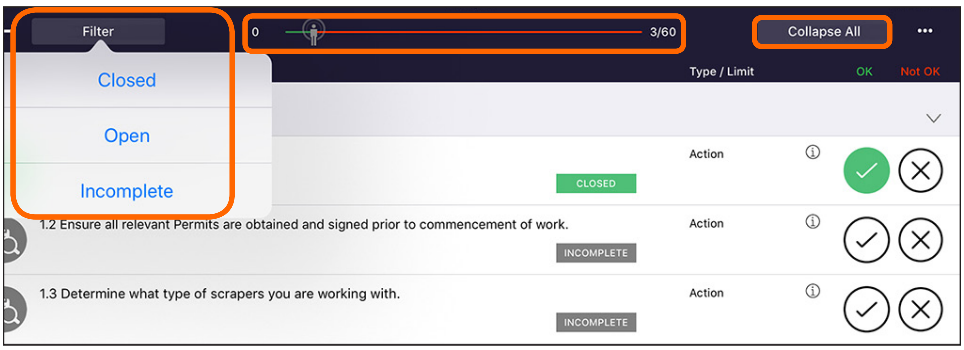
Completing an Inspection

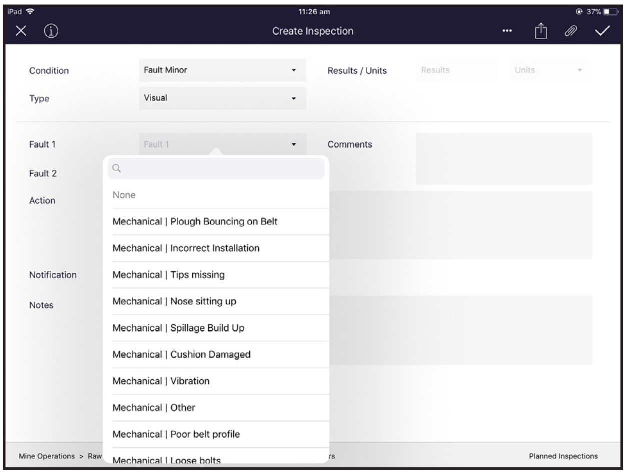
Each task will generally be divided into sub-groups. All sub-groups are expanded by default, but tapping on the sub-group name will collapse that sub-group. There is also a button to collapse or expand all the sub-groups.

There is a filter available to view only **Closed**, **Open** or **Incomplete** inspections, and beside that is a progress monitor that shows progress through the inspection.

Tap on the information icon to view the task information pop-up. To record an **OK** inspection, just tap on the tick, which will then turn green. The inspection will also be marked as closed. Inspections that require data to be collected (e.g. Measure, Pressure etc) will open the **Create Inspection** screen so that the data can be added. In these inspections the task information pop up will give more instructions on what is required.





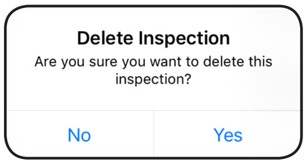


Completing an Inspection (Cont'd)

To record a **Not Ok** inspection, tap on the cross. This will open the **Create Inspection** screen, which allows **Condition**, **Results**, **Fault** (1&2) codes, photo attachments, **Comments** and **Actions** to be saved as an inspection record. Select a fault code (mandatory) from the drop down menu to create the record. The task information can also be viewed from this screen, and the breadcrumb at the bottom of the screen shows the location of the equipment being inspected. Photos can be added by tapping on the paper clip, then tapping on the + sign to take a photo or use one from the gallery.

Any tasks marked as Mandatory must be completed. The inspection can't be completed if there are any mandatory tasks unfinished.

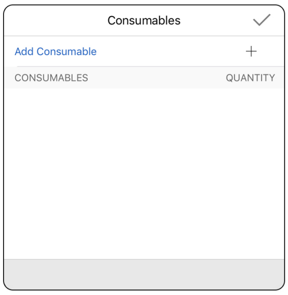
Deleting an Inspection

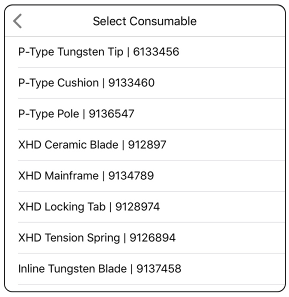


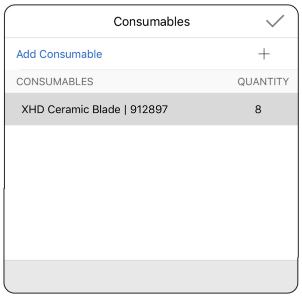
If you mark an inspection **OK** or **Not OK** by mistake, you can delete that inspection. Tap on the selected cross or tick, and you will see the shown message. Tapping on Yes will reset the record, and all previously stored information will be deleted.

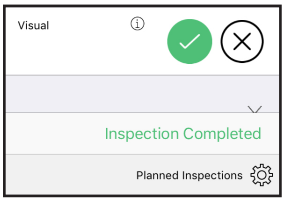
Adding Consumables to an Inspection

Tap on the three dots icon to show the **Consumables** pop-up. Tap on the **Add Consumables** button to show the **Consumables** menu. Select an option from the list of consumables. The **Quantity** will populate automatically, but this can be edited by tapping on the number. Any inspections that have consumables added will have an icon showing on the inspections screen.



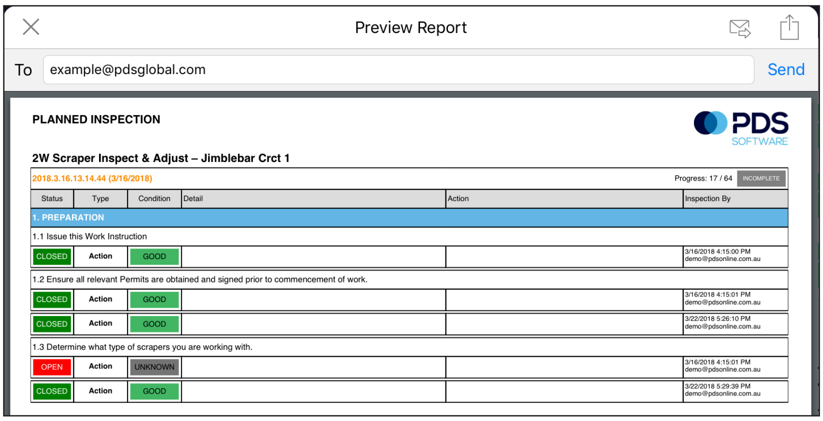






Marking an inspection as Complete

Once all possible inspections have been completed, click on the **Mark As Complete** button. This marks the whole inspection as complete (button turns green), and no tasks can be edited after this step.



Emailing the Report

Once the inspection has been completed, tapping on the three dots at the top right will open the **Preview Planned Inspection Report** pop-up. Tap on the **Preview Planned Inspections Report** button to generate a pdf copy of the report. You can scroll through the pages using the flick gesture, and zoom by double tapping. When ready, tap on the email icon at the top left of the report window, enter the email address you want to send the report to, and tap send.

Closing out Inspections

Inspections can be closed out either by swiping left on an inspection task on the At Fault Inspections dashboard, or by going into an inspection, tapping on a task and tapping on the Close Out icon in the View inspection screen. Both methods will show the **Close Out Inspection** pop-up. You can add a work order number if required, and tap the tick to close out.