# Take ◎ AIM
## Asset Inspections and Maintenance

# Section 1
## Dashboard Help

# Contents

## Manage equipment and reduce maintenance downtime.

Within the document you'll find important information which will enable you to use the TakeAIM system to its fullest capacity.

This help guide will provide information relating to the functions available within your TakeAIM Dashboard. Additional help for the app itself is available in Section 2 of this guide.

If you cannot find the answer to your query or need additional support you can email the Good to Go Safety team at takeaim@goodtogosafety.co.uk

# Overview

## Download the App, Set up an Account and be in Charge of your Workplace Equipment

In the ever changing world of digital technology we recognised a need to develop a digital version of Good to Go Safety's award winning tagging and checklist systems.

We still believe the paper format will remain a firm favourite with many customers (both new and existing) but the benefits that a digital version can offer meant we simply had to explore the possibilities. It hasn't been a quick or easy process but the launch of our mobile app and back-office audit software means that our equipment inspection systems are more useful and accessible than ever before.

The concept remains the same in principle – a competent person will use our checklists to carry out pre-use inspections of workplace equipment – but now it can all be done via an online app on your mobile phones (both Android and I-phone versions are available to download for free).

We have always considered the visibility of our traditional systems a vital feature – with a status tag to store the checklist and clearly display the findings and the date of inspection to remove the risk of assumption. By going digital we were keen to include the option to retain this feature and have combined the visibility of the tag with a scannable **QR Code** which also links the equipment to an asset register. A re-usable **Wipe-Clean GTG Insert** can then be used to update the display in the tag with the date and name of the inspector.

The benefits of providing an asset register when combined with the digital checklist means that findings can be updated in real-time, recorded and stored digitally. This data can then be used to schedule maintenance/inspection programmes and be analysed to identify common faults and trends – allowing companies to plan preventative maintenance based on the data analysis.

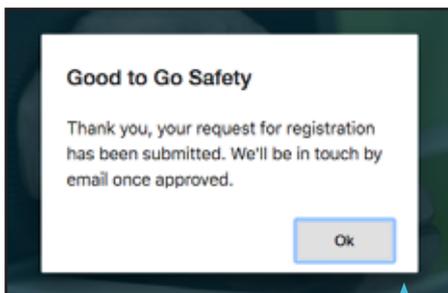# 🏠 Registration: Admin Dashboard

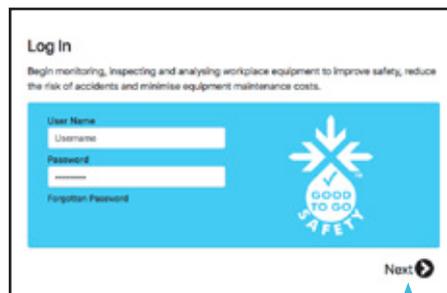## Go to **takeaim.goodtogosafety.co.uk** to register your company
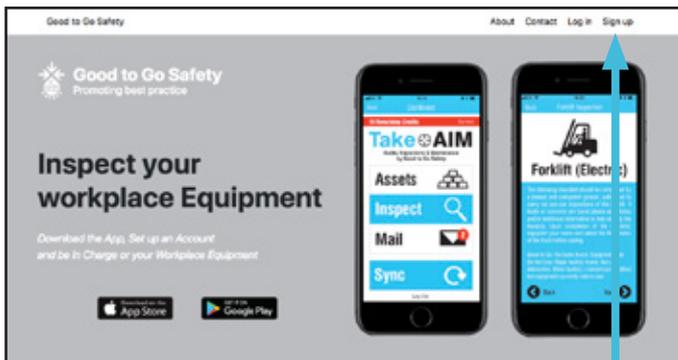


Simply click on the **"Sign up"** link to start



Fill out the Company Registration Form

**Please note:** This registration form should be filled out by a authorised administrator / safety inspector



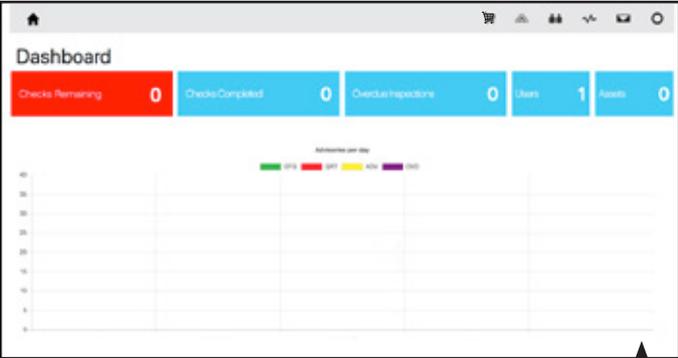Once submitted we will review your company details and confirm authorisation via email



Once you receive the acceptance email you can then log in using your username and password
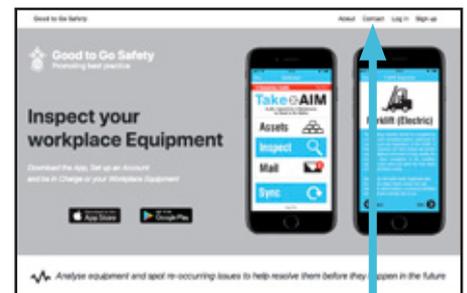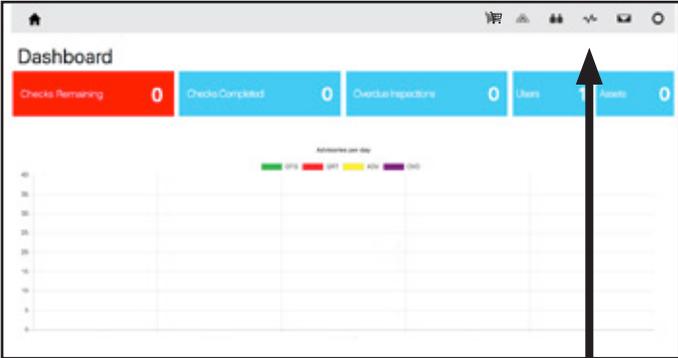


If you have any issues, you can contact us via the contact page

# 🏠 Dashboard



Welcome to your company dashboard. This is your equipment management hub. Once populated, you'll see details such as "Checks Completed", "Overdue Inspections", "Recent Inspections", "Outstanding Repairs" and more.
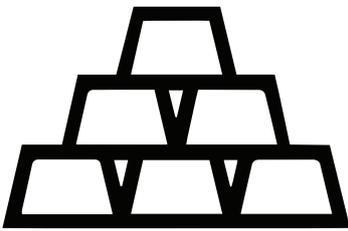


Your dashboard navigational system can be found in the top right hand side of your company dashboard.
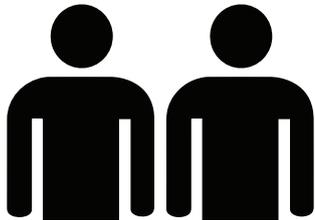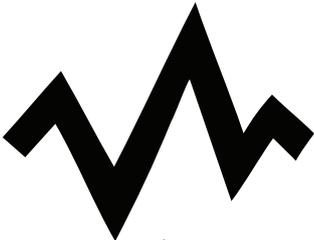
## Navigational System



**Credit** - Within this page you can buy credits and view your purchase history. See pages 5 for more information



**Assets** - Within this page you can register assets to your company. See pages 6 - 9 for more information



**Users** - Within this page you can register users to your company. See page 10 for more information



**Analytics** - Within this section you can view a variety of different reports. See page 11 for more information
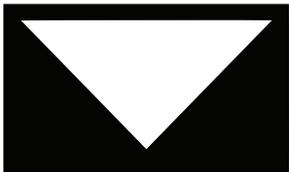


**Messages** - Within this section you can message users directly via the app. See page 12 for more information
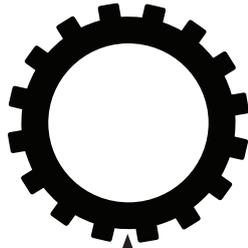


**Settings** - Within this section you can change details, add credit, log out etc See page 13 for more information

# 🛒 Credit

The dropdown from this section allows you buy credits and view purchase history

## 1. Purchase Credits

This is where you are able to purchase credits and other products, such as tags, QR codes and inserts.

You are able to purchase the desired number of checklists by adding your preferred bundle of inspections to the checkout. Once set-up the credits are available to be used by all registered users across all checklist variants.

| | | | |
|---|---|---|---|
| **25** inspections £6.25 ex vat | **50** inspections £10.00 ex vat | **100** inspections £18.00 ex vat | **250** inspections £40.00 ex vat |
| **500** inspections £70.00 ex vat | **1000** inspections £120.00 ex vat | **2500** inspections £250.00 ex vat | **5000** inspections £450.00 ex vat |

## How to Buy

To purchase TakeAIM credits you must first complete the steps below.

**1. Note your Company ID**
Your Company ID Number can be found at the top left of the dashboard's navigation bar, plus within the profile area on the App. Insert your Company ID when asked within registration of your Good to Go account.

**2. Set up a Good to Go Account**
To purchase TakeAIM credits you must first set up an Account at goodtogosafety.co.uk. This links your credits to TakeAIM, plus it also makes buying quicker in the future.

Once you've completed the above steps all you need to do is...

**3. Log into goodtogosafety.co.uk**

Log into your Good to Go Safety Account and find your preferred TakeAIM product.

**Add to Cart**
Add your preferred products to your shopping cart then proceed to the Checkout ensuring you have logged in and your Company ID Number is correct.

## 2. Purchase History

View your purchase history and keep track of the orders you have raised within this section.
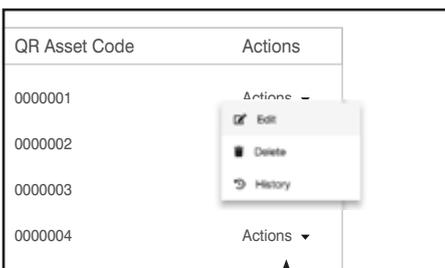
# 🔺 Assets

The dropdown from this section allows you to control your company's assets

## 1. Registered Assets

This section shows all your company's registered assets and allows you to edit details, delete them or view the **History** of specific asset inspections.



| Equipment Type | Name | Location | Brand | QR Asset Code | Actions |
|---|---|---|---|---|---|
| Forklift | FLT001 | Warehouse 1 | Yale | 00000001 | Actions ▾ |
| Pallet Truck | PLT001 | Warehouse 1 | Manutan | 00000002 | Actions ▾ |
| Pallet Truck | PLT002 | Warehouse 2 | Challenger | 00000003 | Actions ▾ |
| Ladder | LAD001 | Warehouse 1 | Ramsay | 00000004 | Actions ▾ |
| Vehicle | VEH001 | Bay 2 | Audi Q7 | 00000005 | Actions ▾ |

## Asset Inspection History



Click on the arrow next to **Actions** to reveal the dropdown menu
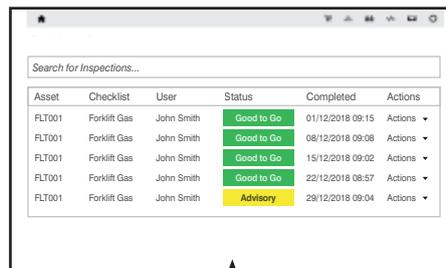


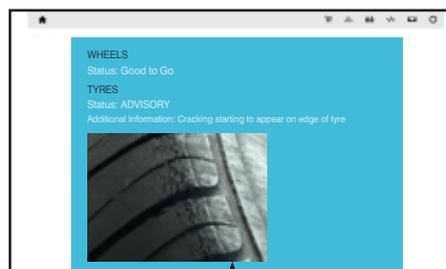Select **History** to navigate to your selected assets inspection history page
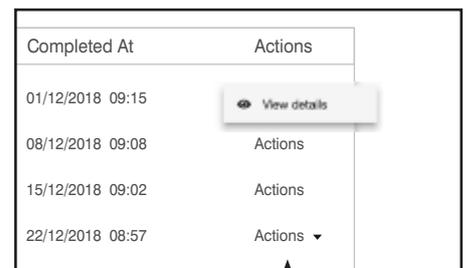


Click on the arrow next to **Actions** to reveal the dropdown menu
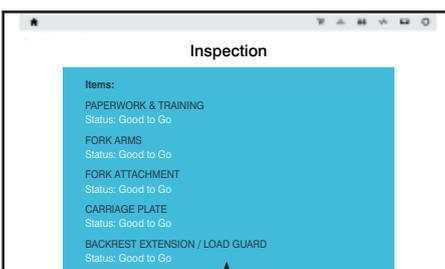


Select **View Details** to reveal more details regarding the selected inspection



Within the inspection you will find information and photos supporting the reason for quarantining equipment or of any advisories that have been highlighted by the inspector.

# 2. Assets Setup

This section allows you to add company assets to a central register. Assets can also be registered using the mobile app if preferred (see Section 2, page 5-6).
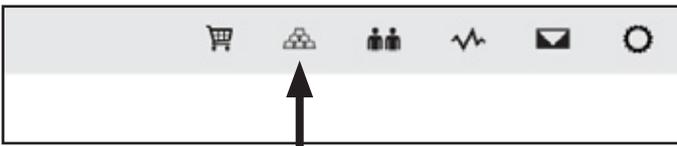


Using the dashboard navigational system, go to **Asset Setup**



From the dropdown, select the **Equipment Type** you wish to add. If you can't find the equipment type required, refer to page 8.



Assign an **Asset Name**. This can be anything, so long as your inspectors can distinguish between assets - especially if you have multiples of the same equipment type/brand.

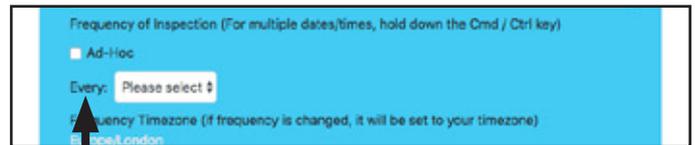**For Example:** A registration plate.
**Top Tip:** Write an identifiable asset name inside our **Status Tag** with a permanent marker and attach securely to the asset.
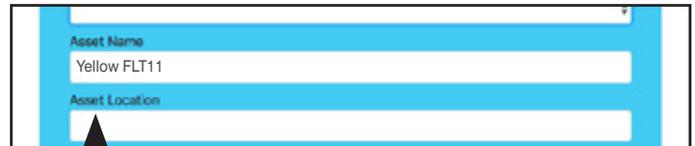


Your **Asset Location** enables your inspectors to ensure that assets remain in the correct warehouses, sites and/or cities.



Add the **Brand** of your Asset - This helps identify your asset



Select your **Frequency of Inspection** to remind inspectors to carry out inspections when required.

**Ad-Hoc:** Don't remind users. Only do inspections when required.
**Day:** Remind users daily at set time(s).
**Week:** Remind users weekly / on set day(s).
**Monthly:** Remind users monthly / on set date(s).

**Please note:** If equipment requires more than one inspection per day (e.g. shift changes) then you can select multiple times for inspections during the day.



Add any **Additional Information** your asset may have such as:
An Annual Certification Number.
The date of the last / next MOT.
The details of the company who performed repairs etc.
Date of annual thorough examination.



Select **Inspectors** for the asset. This shows who is authorised to complete inspections of the asset and send reminders to complete inspections directly to the chosen inspector.

# 3. Equipment Types

This section allows you to review existing equipment types and add new equipment types.
This gives you complete flexibility, ensuring all workplace equipment is inspected.
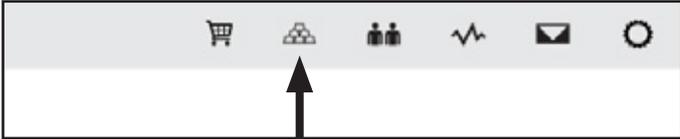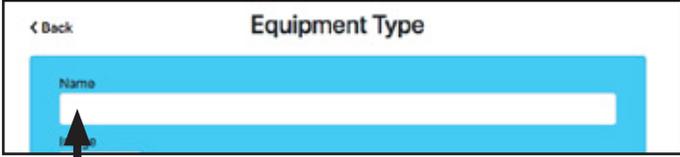


Using the dashboard navigation bar, go to **Equipment Type**



On this page you can review all existing equipment types.



To add a new equipment type select **"+Create Equipment Type"**



Enter the most appropriate name for the equipment type
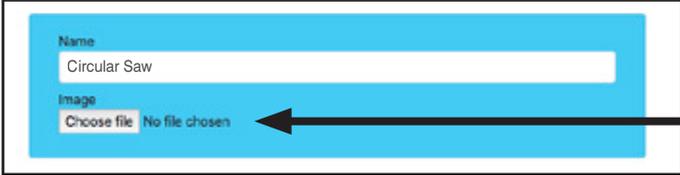


Attach an image which identifies the equipment type

You can take a photo of your equipment type and attach it here to display each time the checklist is opened by an inspector.

Once you have created your Equipment Type, you can then create your checklist (see page 9).

# 4. Checklists

This section allows you to review existing checklists and create a checklist for new equipment types.
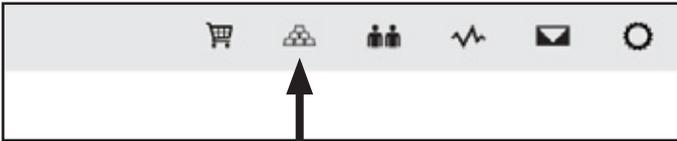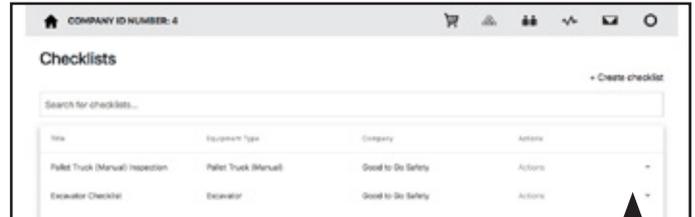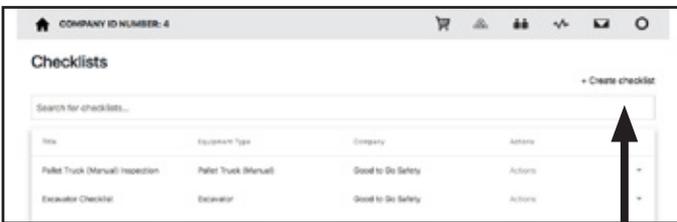


Using the dashboard navigation bar, go to **Checklists**



On this page you can review all existing checklists



To add a new equipment type select **"+Create Checklist"**



Firstly select the equipment type you've just created.



Then enter the name of your new inspection.



Then enter a description for the checklist. We advise to use the following: "The following checklist should be completed by a trained and competent person, authorised to carry out pre-use inspections of this equipment. If faults or concerns are found please add photos and/or additional information to help identify the issue(s)."



To add questions, select **"+Add Question"**



Enter the title of your question. Usually an area/part of the equipment
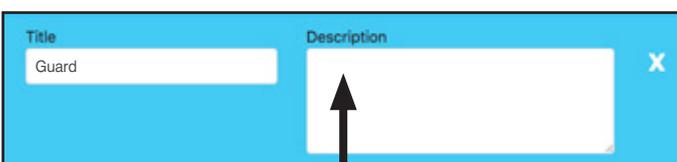


Enter the details of what your inspectors should be looking out for.



Once you are happy with your checklist content, simply save and advise inspectors of its availability and to sync their phones.

# 👥 Users

## The dropdown from this section allows you to control User and Company settings.

## 1. Users

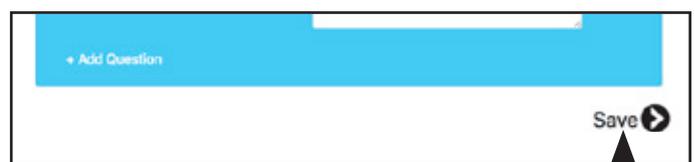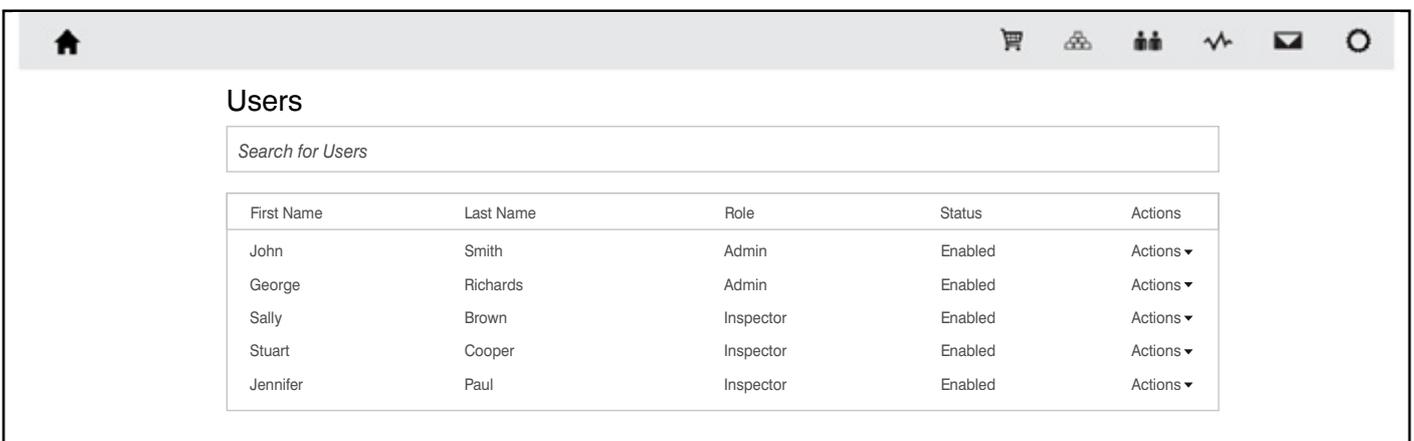Shows your full list of active users and their respective roles (Admin or Inspector). Note: Admin users are able to complete inspections and access the dashboard. All emails must be unique to each user, there is no option to duplicate email addresses.

### Users

Search for Users

| First Name | Last Name | Role | Status | Actions |
|---|---|---|---|---|
| John | Smith | Admin | Enabled | Actions ▾ |
| George | Richards | Admin | Enabled | Actions ▾ |
| Sally | Brown | Inspector | Enabled | Actions ▾ |
| Stuart | Cooper | Inspector | Enabled | Actions ▾ |
| Jennifer | Paul | Inspector | Enabled | Actions ▾ |

## 2. User Setup

This is where you add details of the employees you want to carry out equipment inspections.
You can add / remove users at any time, however you should consider which members of staff have received the necessary training to class them as competent to complete equipment inspections.
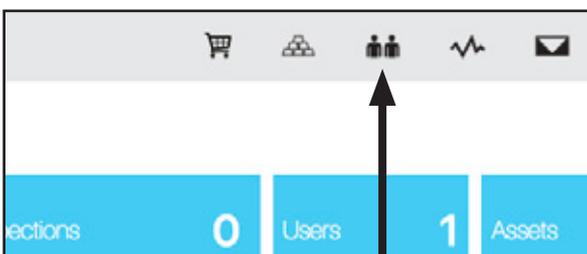
Using the dashboard navigational system, go to **"User Setup"**
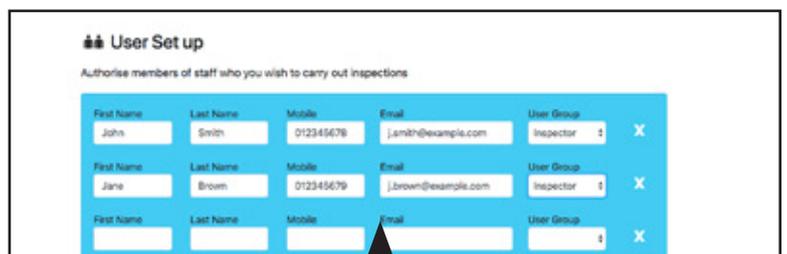
Add employees to your inspectors and administrators. Administrators have access to the APP and Dashboard. Inspectors only have access to the Mobile APP. Once set up and saved, your new users will receive an email and text message welcoming them to Take AIM

## 3. Company

Allows you to edit your company details, and shows your unique Company ID number.

# ᴧᴧ Analytics

This section allows you to analyse inspections and assets in more detail.

## 1. Inspected

View all inspected assets in more detail. You can sort the list using the headers according to date, user, asset or status. This enables you to recognise any trends or re-occurring issues.

## 2. Quarantined

View all quarantined assets in more detail. You can sort the list using the headers according to date, user, asset or status. This enables you to identify critical maintenance issues and minimize equipment downtime.

## 3. Overdue

View all assets overdue their scheduled inspection time/date. You can sort the list using the headers according to date, user, asset or status. This enables you to identify and/or notify inspectors that are not keeping to schedule.

## 4. Calendar

This section shows the next scheduled inspection date for each asset, along with its current status.



| Equipment Type | Name | Status | Next Due Date ⌄ | Actions | |
|---|---|---|---|---|---|
| Racking (Pallet) | CS027 | Good to Go | 19/11/2018 10:00 | Actions | ▾ |
| Pallet Truck (Manual) | CS028 - Orange | Good to Go | 19/11/2018 10:00 | Actions | ▾ |
| Racking (Pallet) | CS026 | Advisories | 19/11/2018 09:45 | Actions | ▾ |
| Ladder (Platform Steps) | CS032 | Good to Go | 19/11/2018 09:00 | Actions | ▾ |
| Ladder (Stepladder) | CS025 | Good to Go | 19/11/2018 09:00 | Actions | ▾ |
| Forklift (Electric) | CS030 - Beige | Good to Go | 13/11/2018 09:00 | Actions | ▾ |

# ◤◢ Messages

## The section is your messaging portal. Enabling you to communicate between users

## 1. Inbox

This is where you can find any messages sent to admin by inspectors and can be used to raise concerns or requirements such as booking maintenance slots or requests to buy in parts as part of a scheduled maintenance programme; or a request to order more checklists, QR code labels / inserts etc. We recommend that administrators check their mail box on a daily basis.

You can also **Create Messages** relating to assets – this is a useful tool to keep inspectors informed of actions being carried out or to remind them of upcoming events such as scheduled services/training etc for specific equipment, or even to let inspectors know they have missed a scheduled inspection.
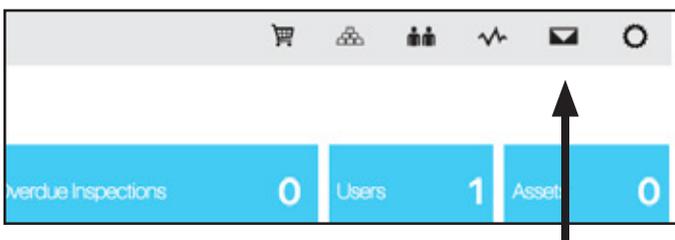
If you have identified an issue with an asset and want to send a message to the inspector(s) assigned to it. Go to Inbox.

Select Create Message in the top right hand corner of the page.

Select the asset in questions.

Once you've selected the asset the inspector associated will automatically appear in the "To" section.

You can now compose your message and Send.

## 2. Sent

This is where you can find any messages sent to inspectors by administrators. Enabling you to keep track of previous requests. Inspectors will be informed on the app when you have sent them a message.

## 3. Archived

Once a message has been actioned it can be archived and stored in this location.

# ⚙ Settings

In this section you are able to edit your profile details and purchase credits.

## 1. Profile

In profile you will find your company details. This is where you can change details / password if required.

## 2. Credits

Another way to access the area where you are able to purchase
credits and other products, such as tags, QR codes and inserts.

You are able to purchase the desired number of checklists by adding your preferred
bundle of inspections to the checkout. Once set-up the credits are available to be used
by all registered users across all checklist variants. (See page 5 for more information).

## 3. Help

Our online dashboard help page which is similar to this document.
Providing advice and guidance on how to operate the TakeAIM dashboard.