

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

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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.

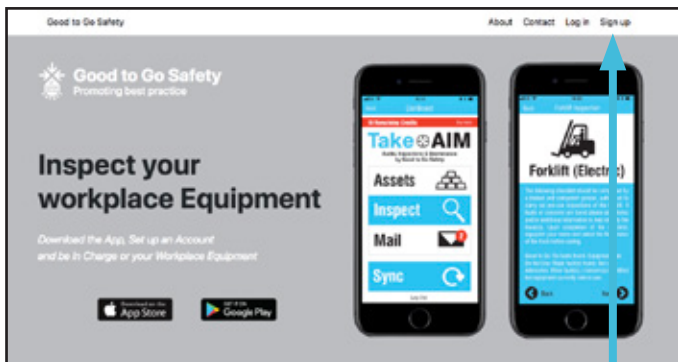
The benefits of providing an asset register when combined with the digital checklist means that findings can be updated in real-time, recorded and stored digitally. This data can then be used to schedule maintenance/inspection programmes and be analysed to identify common faults and trends – allowing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



Good to Go Safety - Take A.I.M

Registration: Admin Dashboard

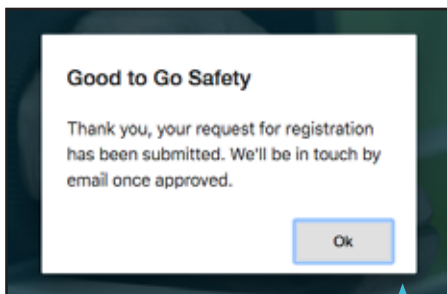
Go to takeaim.goodtogosafety.co.uk to register your company



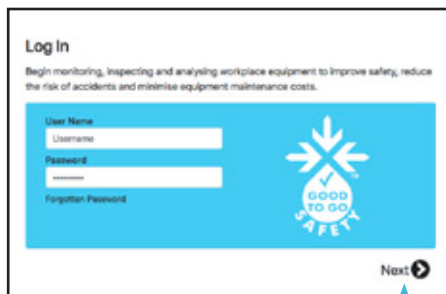
Simply click on the “Sign up” link to start



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

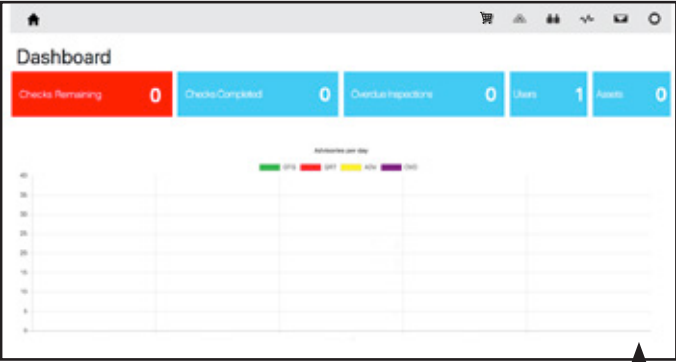


Once you receive the acceptance email you can then log in using your username and password

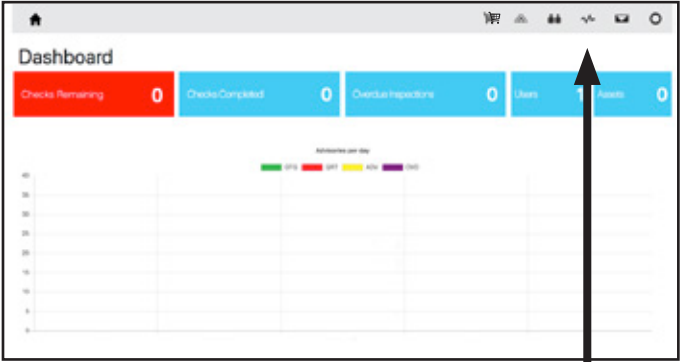


If you have any issues, you can contact us via the contact page

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.

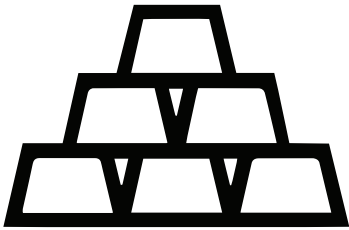


Your dashboard navigational system can be found in the top right hand side of your company dashboard.

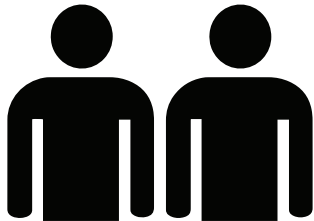
Navigational System



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



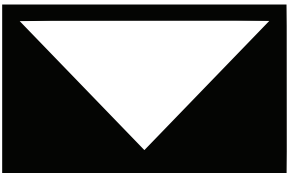
Assets - Within this page you can register assets to your company. See pages 6 - 9 for more information



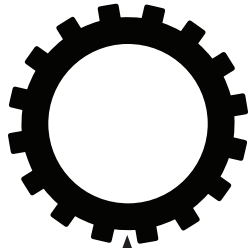
Users - Within this page you can register users to your company. See page 10 for more information



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

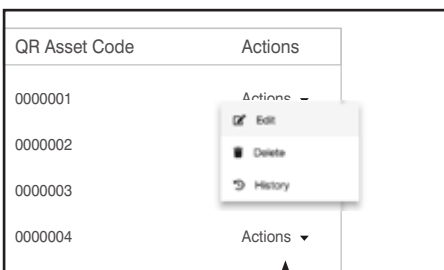
The dropdown from this section allows you to control your company's assets

1. Registered Assets

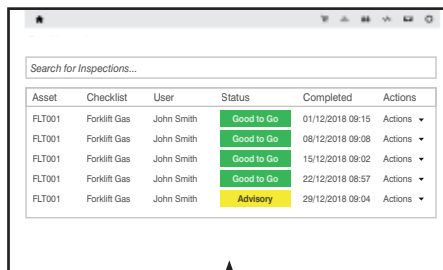
This section shows all your company's registered assets and allows you to edit details, delete them or view the **History** of specific asset inspections.

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 ▾

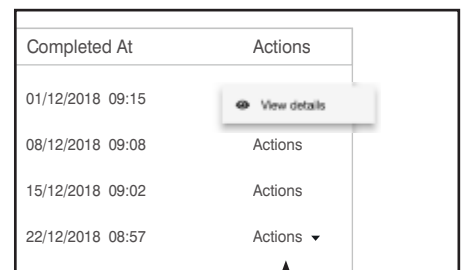
Asset Inspection History



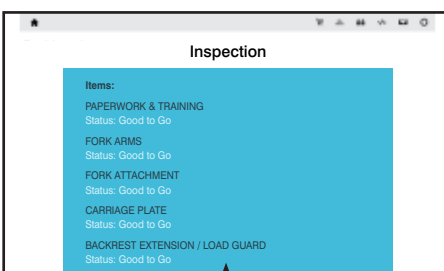
Click on the arrow next to **Actions** to reveal the dropdown menu



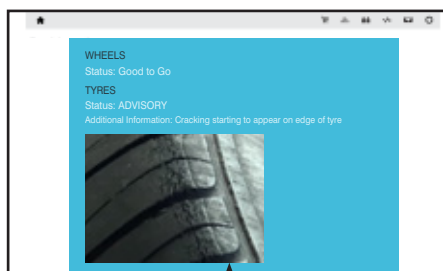
Select **History** to navigate to your selected assets inspection history page



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



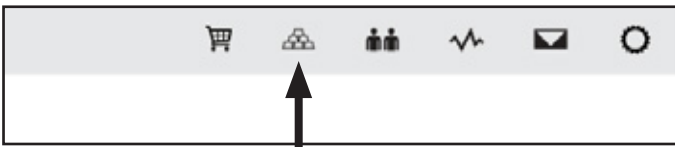
Select **View Details** to reveal more details regarding the selected inspection



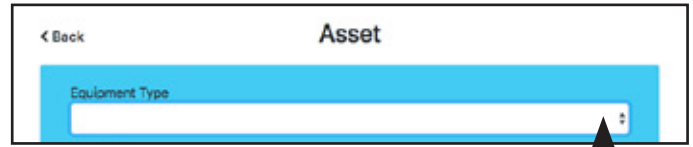
Within the inspection you will find information and photos supporting the reason for quarantining equipment or of any advisories that have been highlighted by the inspector.

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**



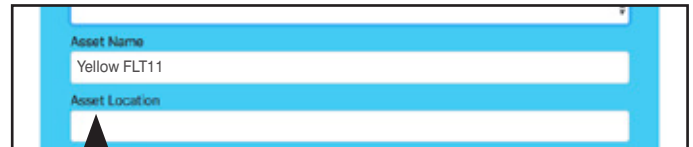
From the dropdown, select the **Equipment Type** you wish to add. If you can't find the equipment type required, refer to page 8.



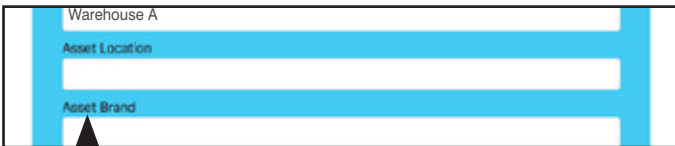
Assign an **Asset Name**. This can be anything, so long as your inspectors can distinguish between assets - especially if you have multiples of the same equipment type/brand.

For Example: A registration plate.

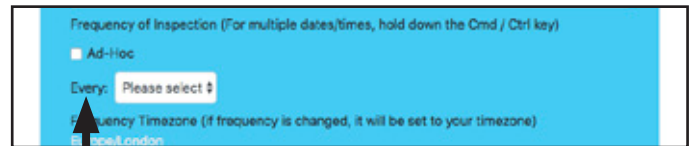
Top Tip: Write an identifiable asset name inside our **Status Tag** with a permanent marker and attach securely to the asset.



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.



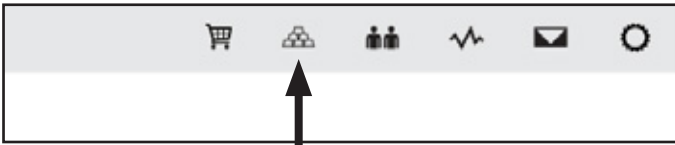
Add any **Additional Information** your asset may have such as:
 An Annual Certification Number.
 The date of the last / next MOT.
 The details of the company who performed repairs etc.
 Date of annual thorough examination.



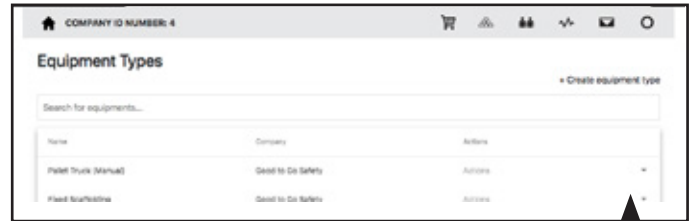
Select **Inspectors** for the asset. This shows who is authorised to complete inspections of the asset and send reminders to complete inspections directly to the chosen inspector.

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.



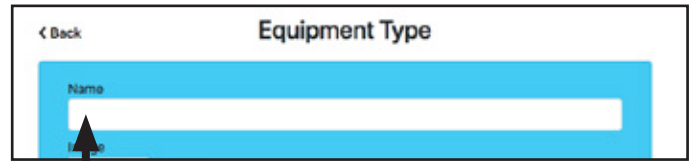
Using the dashboard navigation bar, go to **Equipment Type**



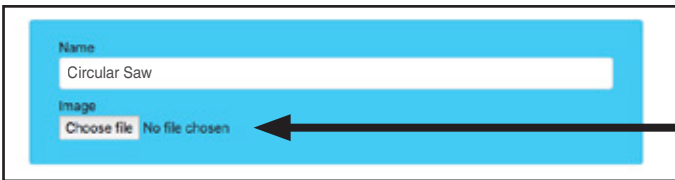
On this page you can review all existing equipment types.



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



Enter the most appropriate name for the equipment type

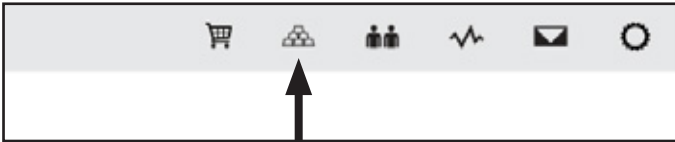


Attach an image which identifies the equipment type
You can take a photo of your equipment type and attach it here to display each time the checklist is opened by an inspector.

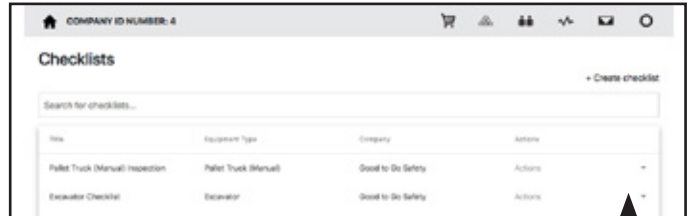
Once you have created your Equipment Type, you can then create your checklist (see page 9).

4. Checklists

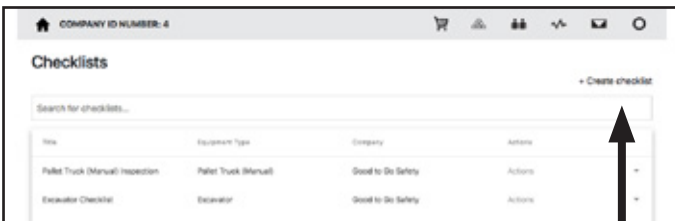
This section allows you to review existing checklists and create a checklist for new equipment types.



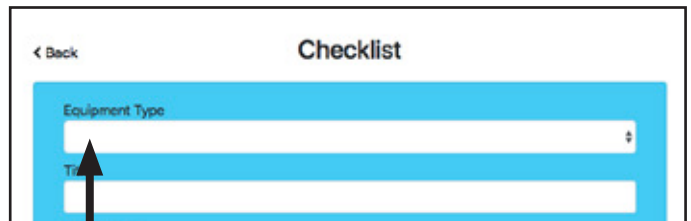
Using the dashboard navigation bar, go to **Checklists**



On this page you can review all existing checklists



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



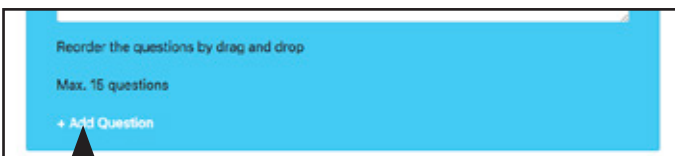
Firstly select the equipment type you've just created.



Then enter the name of your new inspection.



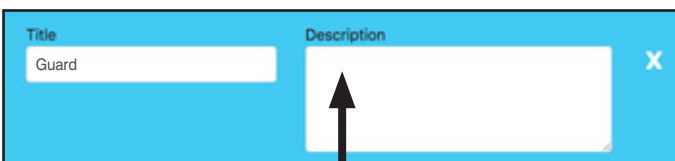
Then enter a description for the checklist. We advise to use the following: "The following checklist should be completed by a trained and competent person, authorised to carry out pre-use inspections of this equipment. If faults or concerns are found please add photos and/or additional information to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



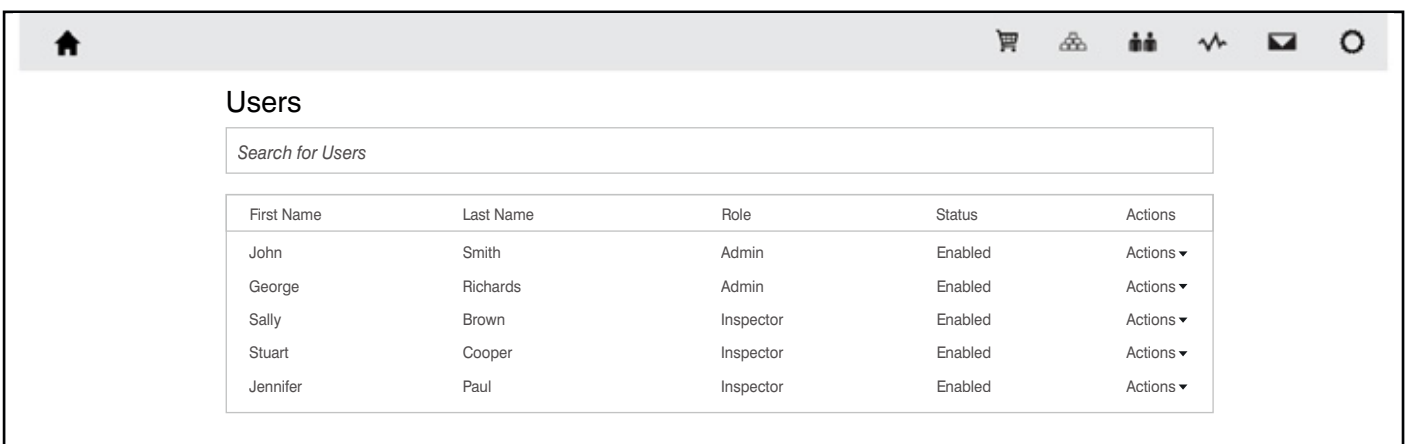
Once you are happy with your checklist content, simply save and advise inspectors of its availability and to sync their phones.

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.



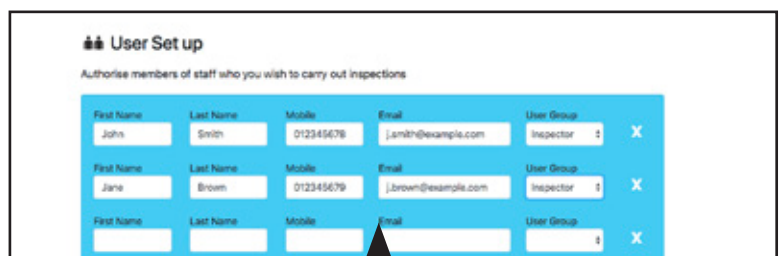
First Name	Last Name	Role	Status	Actions
John	Smith	Admin	Enabled	Actions ▼
George	Richards	Admin	Enabled	Actions ▼
Sally	Brown	Inspector	Enabled	Actions ▼
Stuart	Cooper	Inspector	Enabled	Actions ▼
Jennifer	Paul	Inspector	Enabled	Actions ▼

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.

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.

Calendar				
Search for assets...				
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

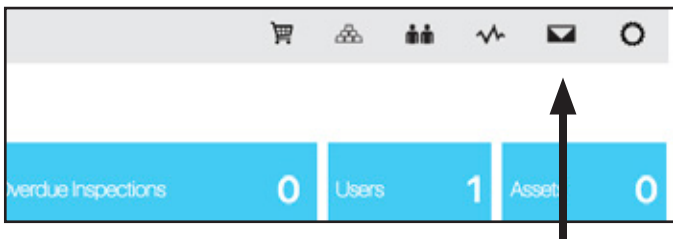
Messages

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.

Take AIM

Asset Inspections and Maintenance

Section 2

App Help

Contents

Manage equipment and reduce maintenance downtime.

Within this 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 when using the TakeAIM mobile app.

Please note that additional information relating to the supporting Dashboard section of the system can be found in Section 1 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

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Overview

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

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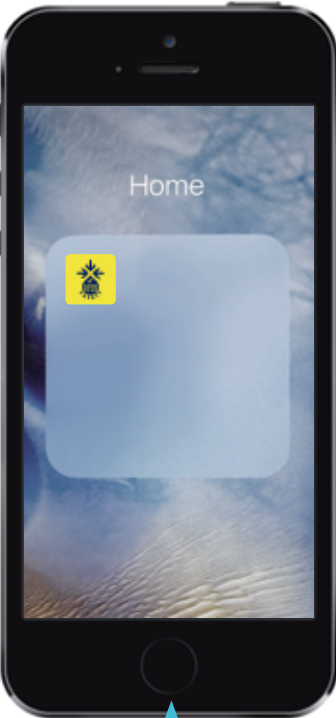


Good to Go Safety - Take A.I.M

Install

You can find the TakeAIM App on both the App Store and Google Play

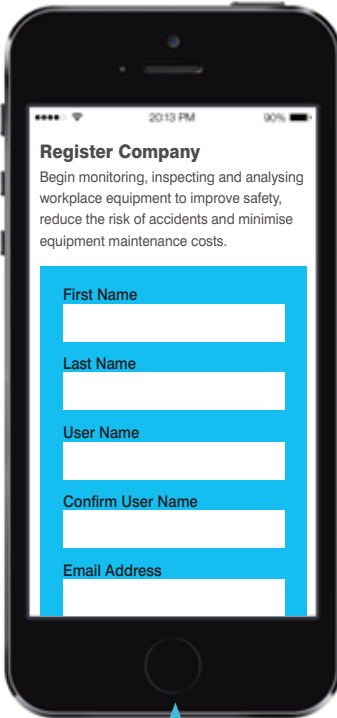
Prior to accessing the TakeAIM App dashboard you will be required to “sign up”.



Download TakeAIM
Once downloaded you'll find the Good to Go Safety Icon on your home screen.



Sign Up
Click on “Sign Up” on the TakeAIM Log In page.



Register
Fill out the form (**Note:** This form should be filled out by an authorised administrator).

The email address you use must be unique and not already used on the TakeAIM app/dashboard.

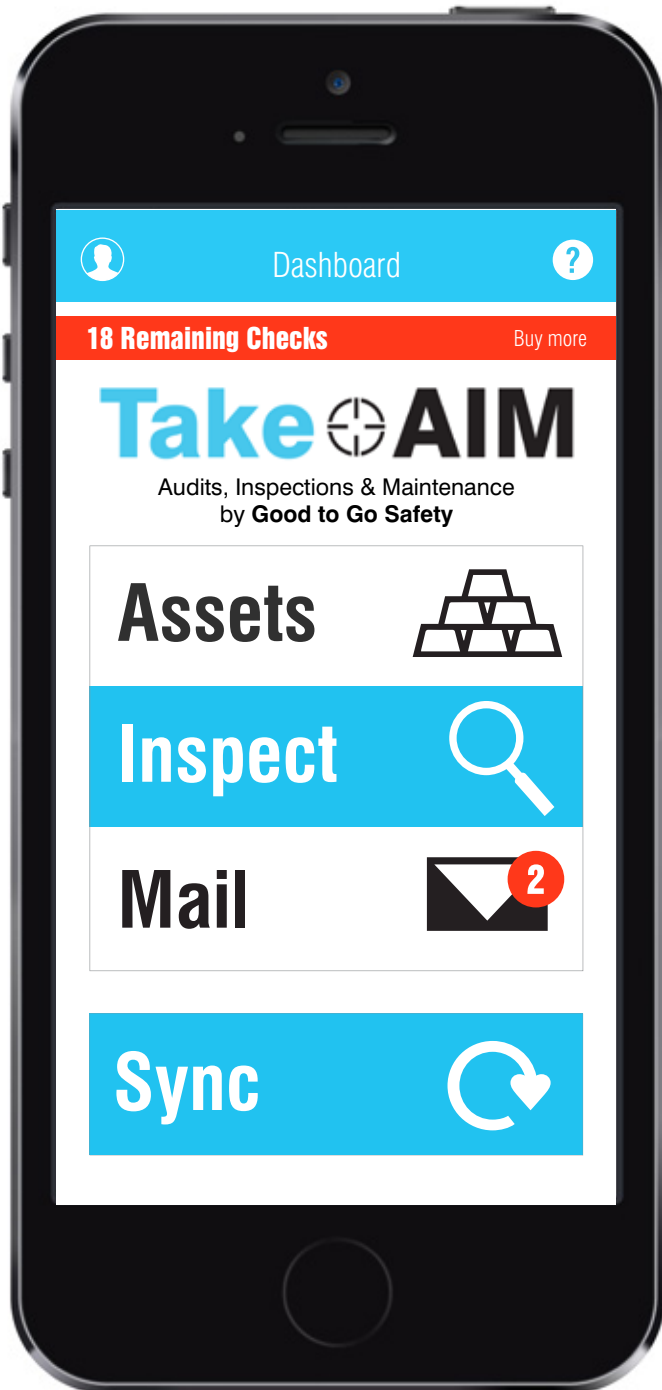


Once submitted we will review your company details and confirm authorisation via email


Once you receive the acceptance email you can then log in using the username and password you set up.


App Dashboard

Welcome to the TakeAIM APP Dashboard



On the App Dashboard you'll find the main functions used to help complete inspections and keep up to date with the latest events.

In the top left hand corner you'll find your  Profile. Within your Profile you can find details such as your Username, Company, Company ID Number etc. You can change your password within this section.

In the top right hand corner you'll find  Home Help. This gives you an overview of your home page.

Below the header there's a Remaining Check countdown. This indicates how many credits you have left and reminds the user to top up when they are getting low.

Below the logo you'll find the main functions of the App.

Assets Inspect

Your assets are all your equipment which require daily, weekly, monthly or ad-hoc checks. These include Forklifts, Ladders, Pallet Trucks etc

Inspect enables users to run through a series of comprehensive questions regarding workplace equipment to ensure that it is safe to use

Mail Sync

Communicate between users and administrators to ensure the status of workplace equipment is known by all.

Acting similar to a refresh button this function ensures users remain completely up to date. If Wi-Fi is unavailable you can still complete a check, then once back in range you can sync data.

At the bottom of the home screen you can Log Out.

Assets

The section allows you to view and control your company's assets

Adding Assets

There are two methods of Asset Registration. We provided the different options because depending on the size of your the company determines which method is more suitable.

Adding them via the App is ideal for companies with multiple sites which require a number of inspectors to add assets whilst on site.

Using the TakeAIM app's navigational system, go to **Assets**.

Add an Asset - Once created all assets will display on this page.

Select which **Equipment Type** you wish to add from the list provided..

Fill out the **Asset Register**. For information on each field see the next page.

Field Meanings

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. The name is what will be seen on the app's list of registered assets (e.g. TA01 - Forklift)

Top Tip: Write your asset name inside our Status Tag with a permanent marker and secure to the asset.



Frequency of Inspections

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

Ad-Hoc: Don't remind. Do checks when required. **Day:** Remind users daily at a set time(s).

Week: Remind users weekly on a set day(s) and time(s). **Month:** Remind users monthly on a set date(s).

Working Week: Automatically selects Mon-Fri and you can set time(s).

Location

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

Brand

The brand of your asset will help your inspectors identify the asset.

Additional Information

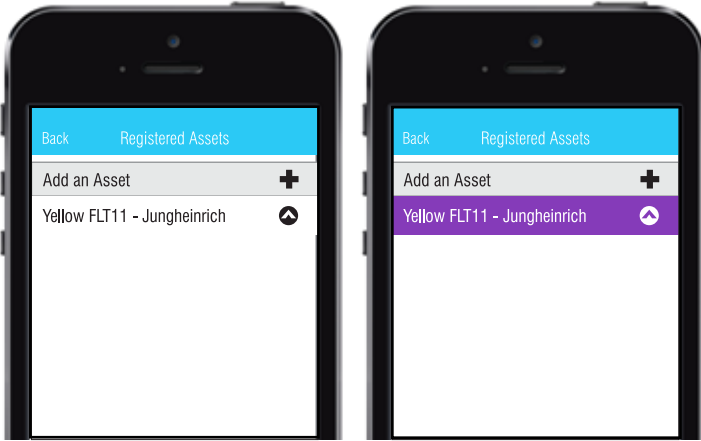
Add any Additional Information your asset may have such as: An Annual Certification Number.

Details of who performed repairs. Date of annual thorough examination. The date of the last / next MOT etc.

Inspector

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

Registered Assets

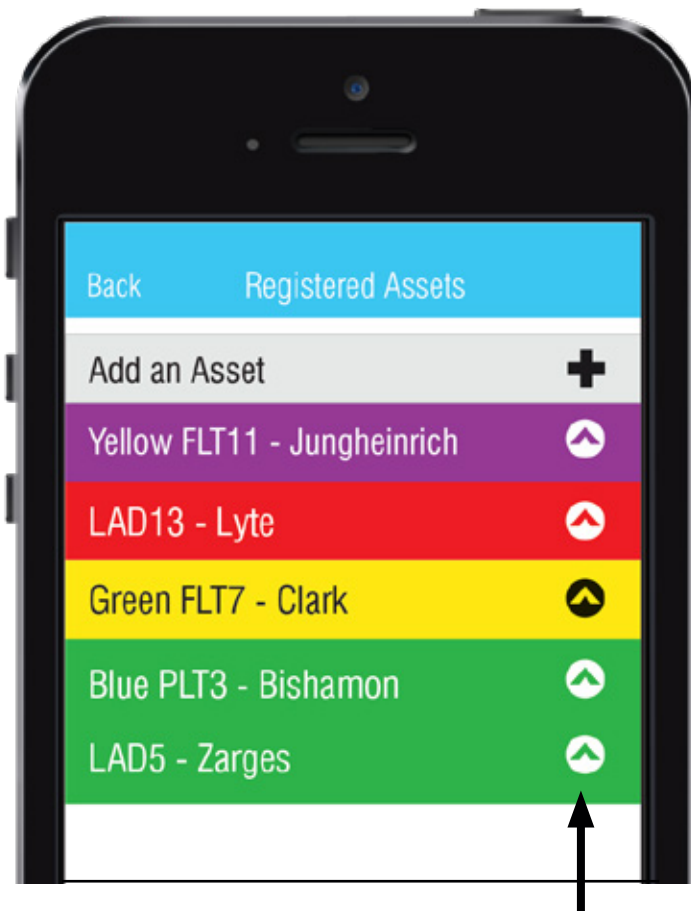


Now that you've added your first asset it will appear within your Registered Assets.

When an asset displays as white it is an indication that the asset is neither overdue an inspection or has ever been inspected. (White usually only displays on new assets).

When your asset is overdue an inspection (based on the "Frequency of Inspection" you selected) it will highlight as purple.

You can add as many assets as you wish. To add different Equipment Types and Checklists view the Dashboard Help PDF (pages 6-10) and log into your company dashboard at takeaim.goodtogosafety.co.uk



Once you've inspected your asset, it will turn the appropriate colour depending on the status.

Good to Go

No faults or concerns found. Equipment safe to use.

Advisory

Minor fault(s) found but the equipment is currently still safe to use.

Do Not Use

Major fault(s) found. Equipment not safe to use.

Overdue inspections will display at the top of this page. Secondary are assets which have been quarantined and require immediate repair to be deemed safe to use. After that comes equipment which inspectors have advised as having minor faults / will need repaired soon and finally at the end are assets which have been deemed good to go.

When you select the drop down arrow, it will open up details of the selected assets last inspection. If there have been issue(s) / information highlighted within the check they will display here.

Inspect

The section allows you to assign QR Codes and inspect equipment.

Option 1: Using TakeAIM QR Codes

Once assets have been registered you can then assign QR codes to your equipment. Assigning QR Codes to your assets will help save any confusion and reduce inspection time. Follow the simple rules below to link assets to an assigned QR code and make the TakeAIM system even easier to use.



1. Apply the TakeAIM QR Code

Stick your TakeAIM QR Code to your asset. We advise to apply it to the inside of the Good to Go Safety Status Tag to prevent damage.

2. Scan your TakeAIM QR Code

Once scanned you will be asked whether you'd like to assign it to an already registered asset or register a new asset. If you select to register a new asset it will take you to the "Asset Registration Form". If you select to assign it to an already registered asset it will enable you to find and select the appropriate piece of equipment.

3. Complete

Once saved, the QR code will then link directly to your asset. This means that the next time you scan the QR Code it will automatically take you to the appropriate inspection checklist and log the details for your asset.

Lost or Damaged QR Codes

If a QR Code is damaged or lost, a replacement can be applied and then assigned to an existing asset. This will replace the lost QR Code but will not affect the assets history. Your users can then continue as normal. QR Codes can be purchased at www.goodtogosafety.co.uk

Inspect

Option 2: Inspections without QR Codes



Select Inspect from the main navigational system.



Click "Skip" in the bottom right hand corner.



Select the asset which you would like to inspect.

If you don't wish to use QR Codes you can still inspect your assets by skipping "QR Scan".

When you skip the QR Scan the App will take you to your Registered Assets Page. Select the Asset you wish to perform an inspection on.

Please note: If an asset has a QR Code assigned to it, you must scan the QR to complete the check.

Completing an Inspection



Once you have scanned your QR Code or selected the asset you wish to inspect, the app will begin the inspection for the equipment type. You will be asked a series of comprehensive questions which you must answer with one of the following:

Good to Go

No fault / concern(s) found. Equipment is safe to use

Advisory

Minor fault or concern(s) identified but safe to use

Do Not Use

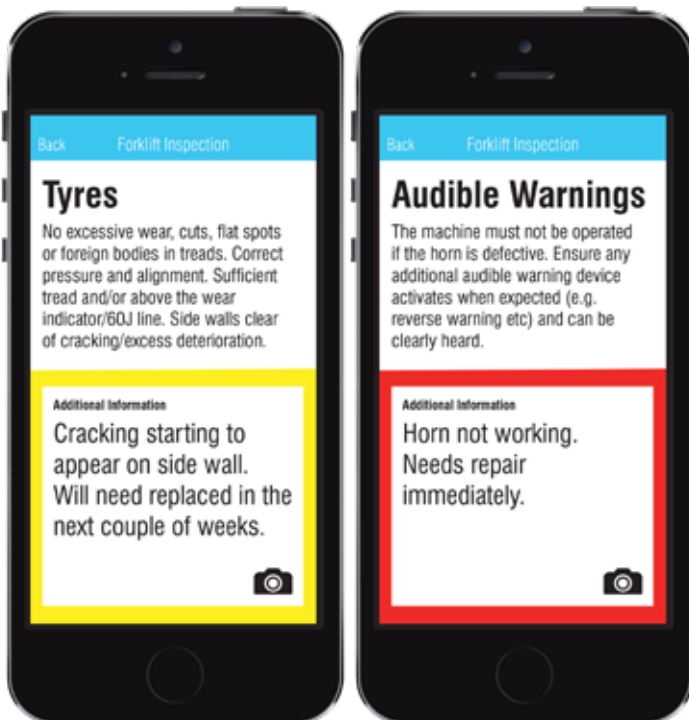
Major fault(s) found. The equipment is not safe to use

Not Applicable

This question is not applicable

Inspect

Documenting Faults within the Inspection

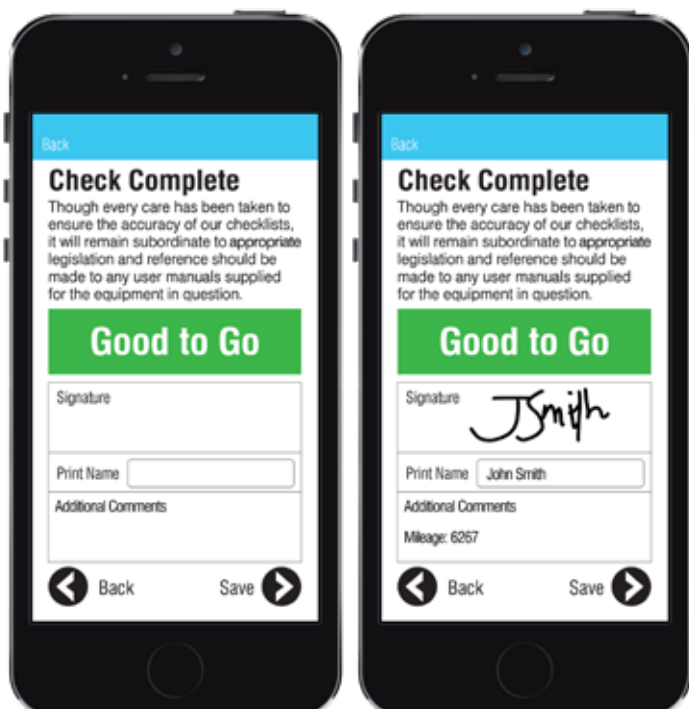


When you identify a fault / concern with your equipment and select either “Do Not Use” or “Advisory” the TakeAIM app will ask for additional information / images to document within the dashboard.

If your inspector feels that the issue requires a photo they can take a photo and attach it to the inspection by using the small camera icon in the bottom right hand corner of the Additional Information box.

Additional information can be typed into the box to support their findings or recommend corrective actions.

Inspection Complete



Status

At the end of the inspection, the app will show the appropriate status for the equipment type based on the inspection findings.

Once the status has been selected your inspector must then sign and print their name.

The date and time will be taken automatically from the phone’s settings.

Additional comments can be added at the end of the inspection if required.

Mail

Communicate between users and administrators and ensure everyone is up-to-date

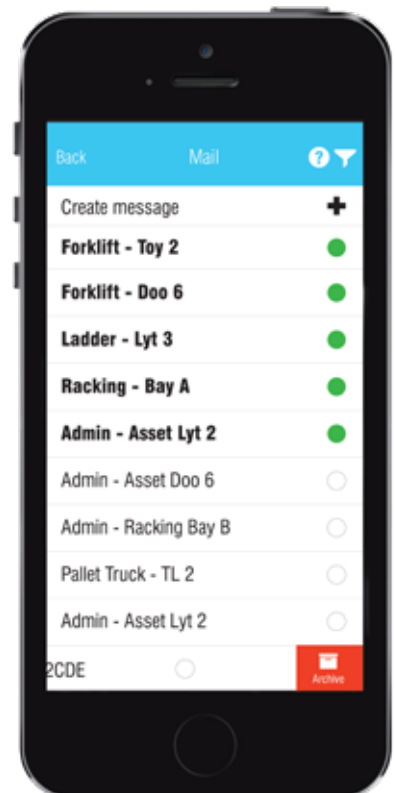
The mail feature on your app's home screen will inform you if you have unread mail. This may include messages from fellow inspectors, your admin team or from Good to Go Safety advising of important updates to upload.

When you enter mail you'll see your new in-app messages highlighted in bold. These will either be from other inspectors or the App reminding you of overdue inspections which you are responsible for.

You can send messages directly to other inspectors, your administrative team or the TakeAIM team by selecting "Create Message".

To get rid of read messages, pull them to the left to archive them.

You can filter your messages by New on top, Old on top, Unread, Read, Asset Name ascending and Asset Name descending.



Creating Message



Message inspectors and administrators directly to remind them of overdue inspections or inform of maintenance / repair times. You can also send the TakeAIM support team messages from this section to highlight issues or to recommend equipment types that we don't currently cover.

Firstly select the asset which you wish to discuss, then select the user(s) associated with the selected asset that you wish to message.

Once you've selected the correct asset and user(s) you can compose your message and send. This will then feature on the recipients home screen.