OnSiteForm User Guide

Version: 3.1

Relating to OnSiteForm App Version: 1.6.87 and above.

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Dated: August 10th 2026

Contents

1 Introduction

It is recognised that an automated process of collecting site inspection information is an efficient way of using inspectors' time, allowing them to spend more time on conducting inspections and spending less time on the administrative tasks traditionally surrounding the inspection activity.

The OnSiteForm System is a web and tablet/smartphone device-based application that enables inspectors to build and run inspections over the Internet through their web browser or using one of the following handheld platforms:

- Apple iOS (iPhones / iPads)
- Most Android (Phones / Tablets)

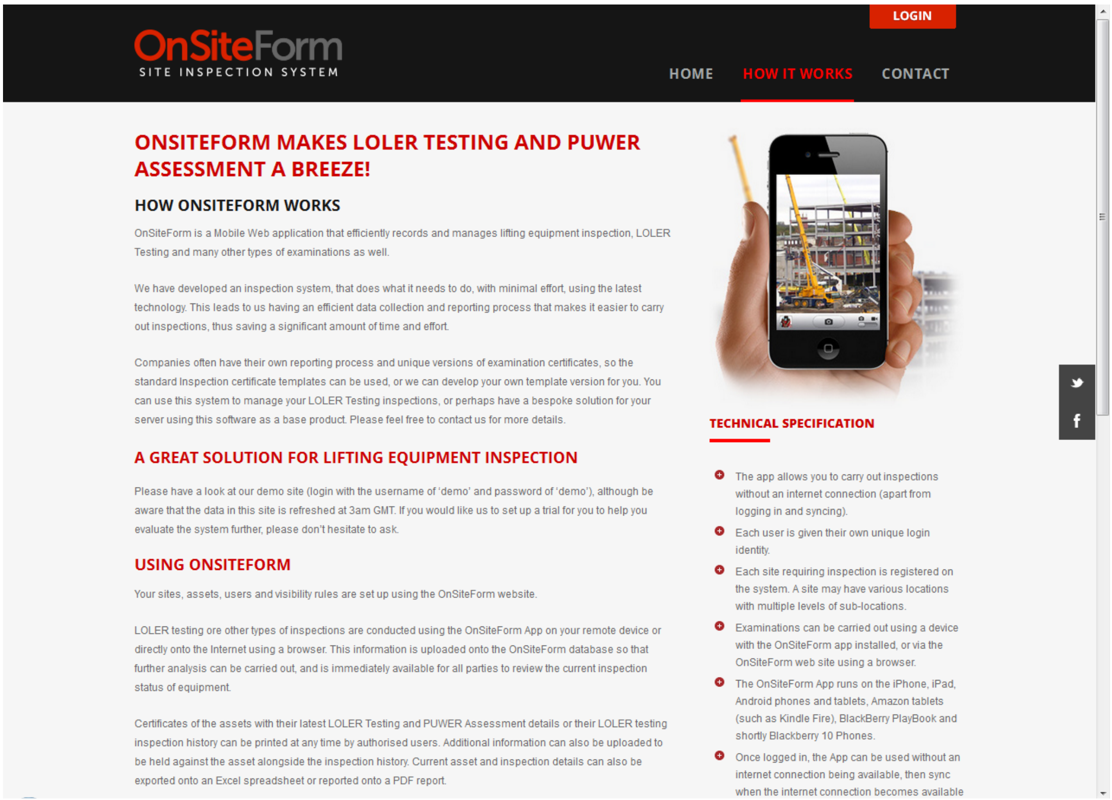
The handheld device does not need to be connected to the internet during the inspection. It is only needed to sync at the start and the end of the inspection, which can be done at the office. This allows an offline inspection to be carried out without the risk of interruption through the lack of a good connection.

This document describes the standard OnSiteForm functionality.

The first part of the document concentrates on the web site of the application, with the final sections looking at using the tablet/smartphone with the OnSiteForm app.

On the main OnSiteForm website, there are two pages, "How It Works" and "Contact" that are of particular interest.

1.1 How It Works



Pressing "How It Works" takes you to this page, which tells you what you can do with OnSiteForm, and the technical specifications for running it on your mobile device. While obviously not as in-depth as this User Guide, it is still a helpful tool when it comes to the use of OnSiteForm.

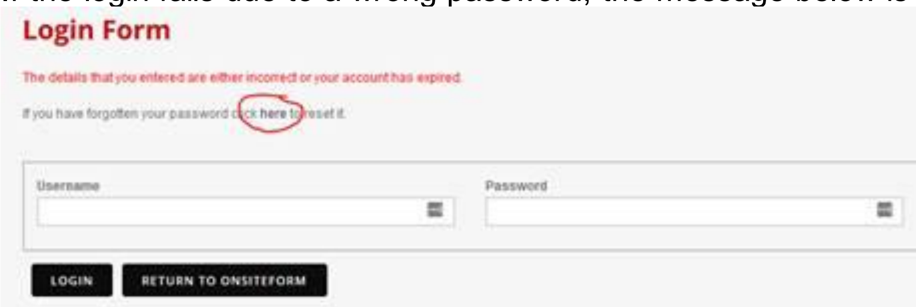
1.2 Contact

Pressing the "Contact" button takes you to the contact page. Should you wish to get in contact with the OnSiteForm helpdesk, the page provides you with an area for you to input your name, email, and reason for getting in contact to enable you to get your queries in quickly. Alternatively, there is a phone number provided if you would prefer to get in contact via a phone instead.

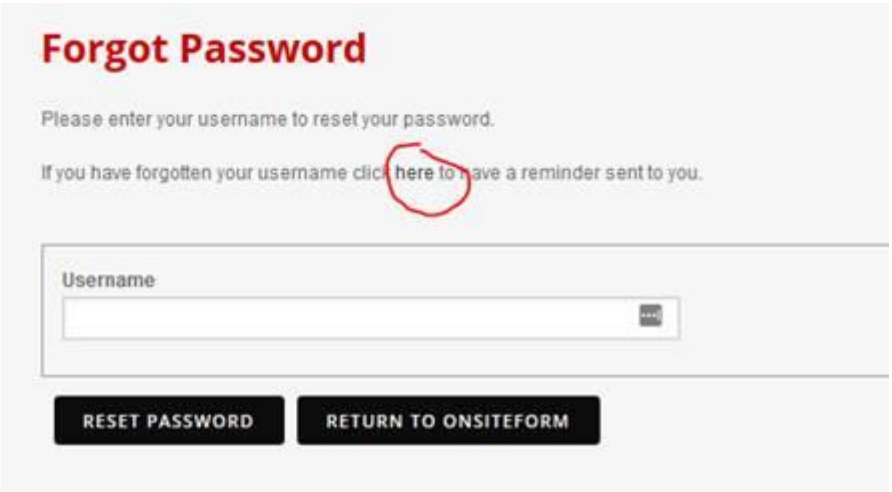
2 System Login and Dashboard Landing Page

The system is accessed from the website https://www.OnSiteForm.com/. If you are already a user, you will have a pre-existing username and password that you can use to log on to the system. If you do not, the username and password of 'demo' will take you to a demo version of the site, where anything done will be removed from the system at the end of the day, allowing those who are not users yet a chance to explore the site and see if it helps them.
Note: Logging on is case sensitive.

If the login fails due to a wrong password, the message below is shown:

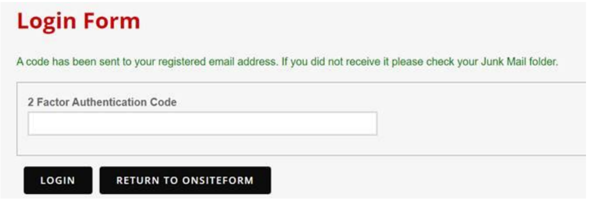


Click 'here' and the screen below will be shown. If you don't know your username, clicking on "here" will allow you to enter your email address and your username will be emailed to you.



Once you know your username and have submitted it in the first step above, an email will be sent to you with a link to reset your password. This will expire after two hours and after that time you will need to enter your username again to be sent a new password reset link.

Customers may request two factor authentication to be applied on their account. If set, a new permission will appear against users (See 3.8.2 Edit Permissions) 'Disable 2FA for this user'.
If enabled, when the user logs in, the 2FA process is initiated. After entering the Username and Password correctly, this Login Form will be shown:

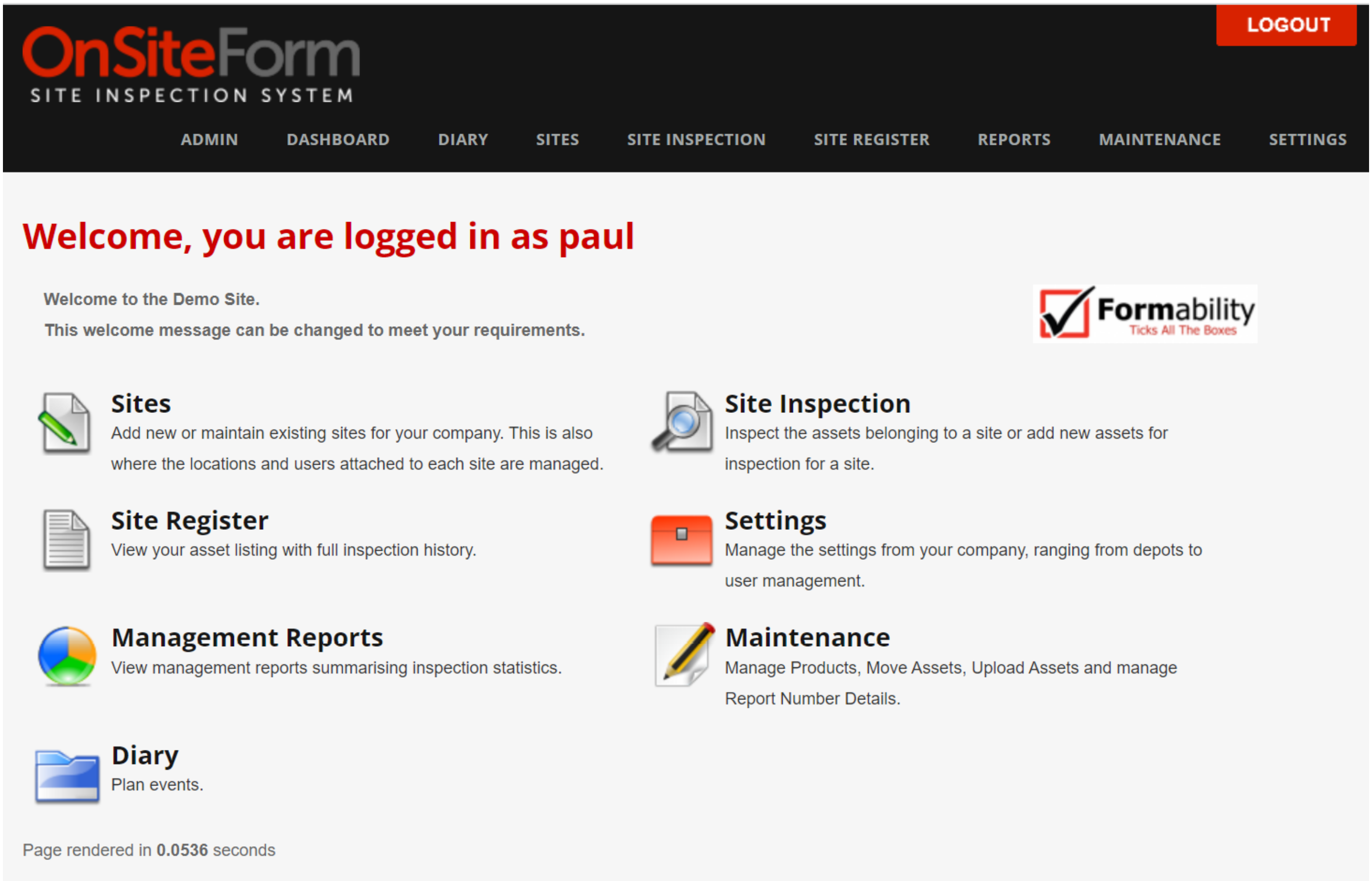


An email will be sent to the registered email address of the user logging in. It will say something like:

Here is your 2 Factor Authentication code to log into OnSiteForm. This code is valid for 5 minutes.
979f6cd
OnSiteForm

Enter the 2 Factor Authentication Code into the screen and the user is logged in as usual.

After logging in, you will be taken to the dashboard page:



From here, users can access and navigate the system. In order to navigate, users can either click on the 'Breadcrumbs' in the top left to navigate to those pages, or hover over them to be able to select a subpage in that category. Alternatively, users can use the options in the centre of the screen. What the user can access depends on their permissions. As a minimum, users will be able to see the Site Register details that are assigned to the sites the user has access to.

At the top of the screen, for logins for sites, there will be a welcome message and your company logo. The welcome message and logo are maintained as one of the ‘Theme Settings’ options.

The ‘Sites’ option allows administrators to add and maintain the main site details, locations for that site and specific users that may also access that site; additional to those with overall access.

The ‘Site Inspection’ option allows inspectors to inspect assets that belong to a site, as well as add new assets for an inspection of a site.

The ‘Site Register’ option enables users to view the asset listing of a site with the full inspection history.

The ‘Settings’ option allows administrators to manage the account settings such as conditions, depots, email alerts, inspection types, units of measure, add new users to the company, and change how the site looks for the company.

The ‘Management Reports’ option allows administrators to manage products, move assets and manage report details.

The ‘Maintenance’ option allows administrators to manage asset details settings such as Products, Asset Upload, Report Number and moving assets.

The ‘Diary’ option allows administrators to plan when inspections are to take place.

Depending on the size of the browser window used to access the website, the appearance of these options can change in size. They can go from distinct, separate options to being kept in a top-down box.

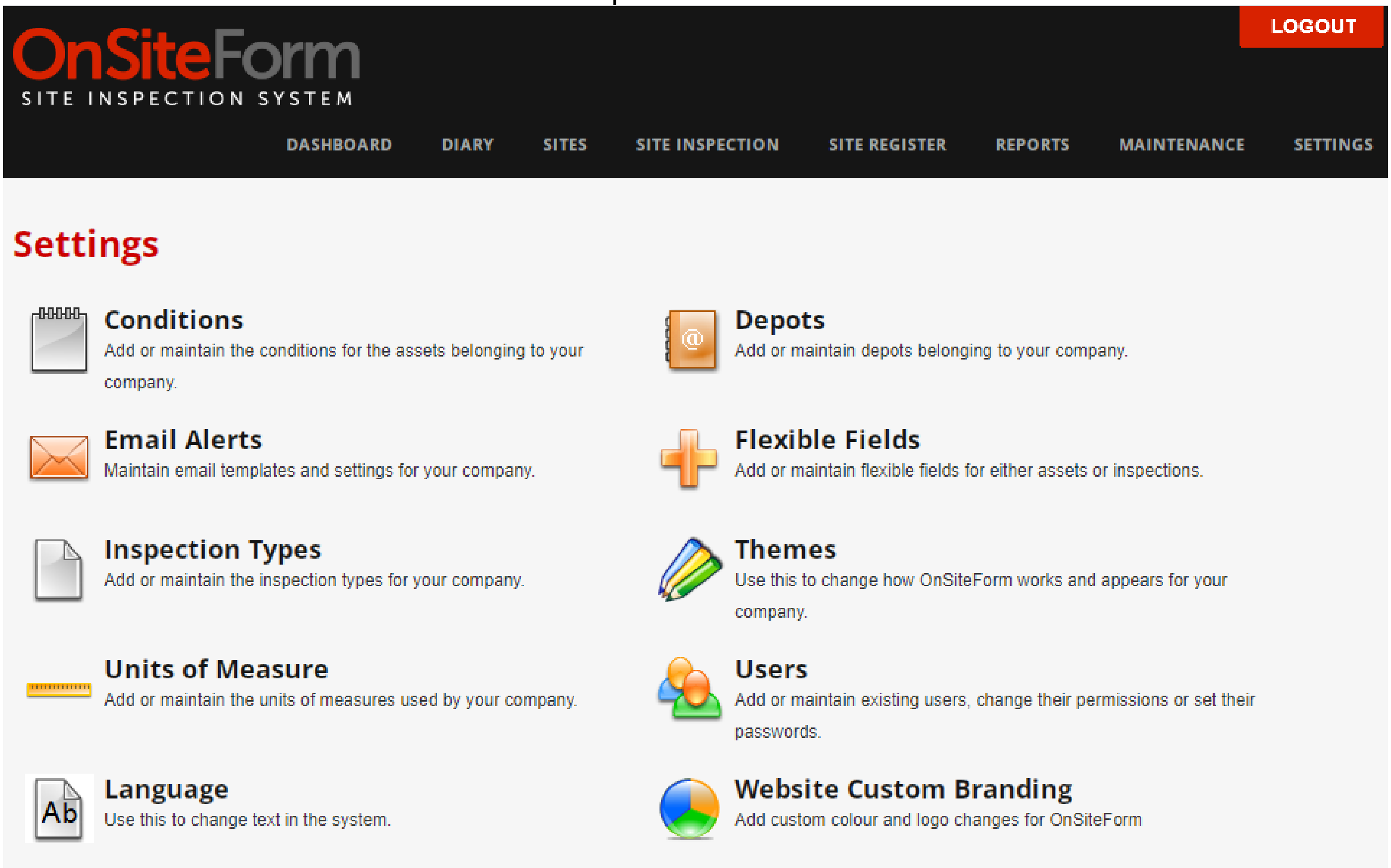
Each user will be given a username and password by the administrator that will give them appropriate access to the system.

The System Administrator administers this authentication process.

The ‘User Names’ and ‘Passwords’ are managed by the System Administrator in the Settings pages.

3 Settings

Here the administrator can maintain the inspection environment.



3.1 Conditions

The conditions settings screen specifies the types of conditions that can be applied to an asset, such as 'SCR' for 'Scrapped' or 'DEF' for Defective'.

By editing the condition, the administrator can specify for the condition:

- The wording used to describe the condition
- The background colour
- The font colour
- The overdue condition background colour
- The overdue condition font colour.

Conditions are pre-seeded when adding a super-user customer. Although conditions are maintained by the administrator, 'NF' and 'OK' cannot be removed.

Administrators can edit exactly what the different conditions do, like change the code used to describe them, the description of the code, the description of the condition, the background and font colour the condition changes assets, and the background colour and font the condition changes overdue assets.

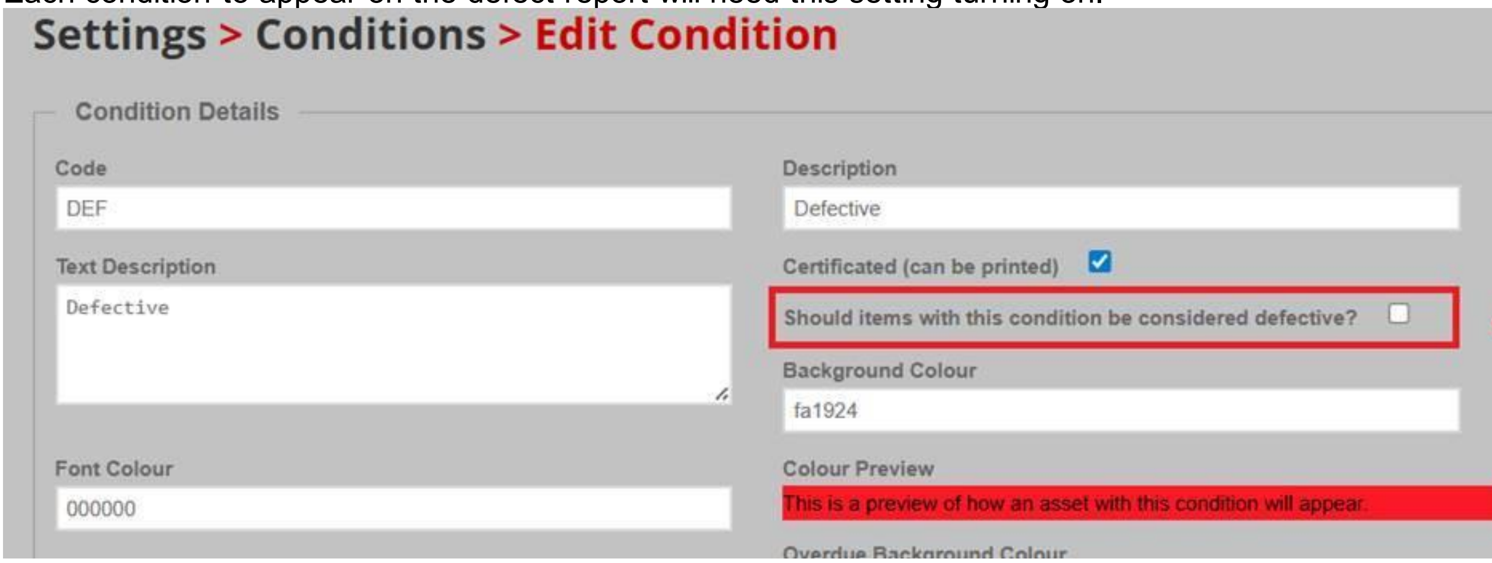
Administrators can also add new conditions. This has the same details as editing existing conditions, though the only ones that they are actually required to fill are the code field and the description fields, as the colour and fonts have the default white and black respectively already there.

Both adding new conditions and editing existing conditions has a checkbox marked "Certificated (can be printed)" already checked. This enables assets marked with this condition to be printed if one needs to. Unchecking it stops that asset from being printed, such as someone printing a list of assets.

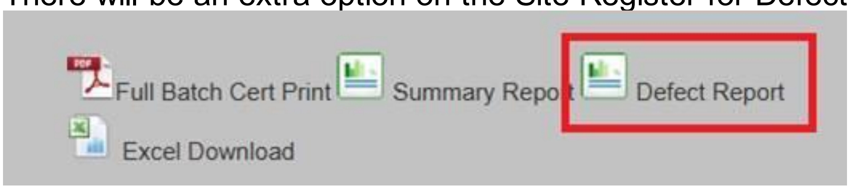
At the bottom of the screen, there is a setting call "OBSOLETE SETTINGS".
On selection, the administrator can choose the colour coding that can be used if an asset becomes obsolete. This is typically used with PPE when certain equipment becomes obsolete after a certain date has passed. The colour code is shown when inspecting. On the Site Register, the word 'Obsolete' appears under the condition.

3.1.1 Defect Reporting

There is an improved method for defect reporting, using guidance we have obtained from LEEA.
To use this feature, please request for the functionality to be turned on.
For reference, these are features whose permissions can be turned on:
There will be an extra setting on conditions to identify defect conditions.
Each condition to appear on the defect report will need this setting turning on.



There will be an extra option on the Site Register for Defect Reporting.



The printed Defect Report will show, as advised by LEEA:

- The key defect details.
- Observations / additional comments relative to the thorough examination.

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Bury
Lancs
BL9 5BT

Report of Thorough Examination - Defect Report List

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Equipment Identification Number	Equipment Description	Identification of Defective Parts	Is the defect of Immediate danger to persons*	If not Immediate Danger, when will it become a danger without rectification	Particulars of Any Repair, Renewal or Alteration to Remedy the Defects
CB01	Chain Block	Chain Damage	YES		Take out of service
CB01	Chain Block	Chain rust found	NO	01/03/2027	
CB03	Chain Block	Hook : Throat Opening. Worn Safety Latches	YES		Remove from service
CB04	Chain Block	Block housing deformed.	NO	30/04/2026	Replace block housing
CB05	Chain Block	Chain	NO	28/04/2026	Replace affected chain

*if yes, must report to HSE

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Report of Thorough Examination - Defect Report List

Formability Lifting
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Lancs
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Equipment Identification Number	Observations / additional comments releative to this thorough examination
CB01	Chain Damage: Elongated/stretched links (indicating overload), 2 twisted links, rust, corrosion, cracks and surface pitting.
CB01	Rust identified on a small are of chain. Clean chain.
CB03	Hook Failure: Bent/twisted hooks, excessive throat opening (10% beyond normal and worn or broken safety latches.
CB04	External Damage: Deformed block housing
CB05	Chain Damage: Elongated/stretched links (indicating overload), 2 twisted links, rust, corrosion, cracks and surface pitting.

3.2 Depots

Inspections may be carried out by a depot. For small inspection organisations, then the ‘NAT’ National Depot coding should be used. The address details set up are printed on the certificates and reports. This screen also provides a quick lookup view showing sites and users allocated to this depot.

In order to add a new depot, users can click the ‘Add Depot’ tab in the top left. This opens up the ‘Add Depot’ page. Fill in the Depot name and address details.

Optionally, an alternative company logo and accreditation logo can be added. When a user is allocated to a depot, and the depot has logos set up, then these depot logos will override the company, site or inspection type logos. This allows for a third party to be set up with their own inspectors. Anything inspected by these inspectors will display the third-party logo details.

Once a depot has been added, or if users want to know more about existing depots, it is possible to view the sites attached to a depot by pressing the “n Sites” button where ‘n’ represents the number of sites attached to a depot.

Settings > Depots

ADD DEPOT

Depot Code	Depot Name	No of Sites	No of Users	No of Addresses	Actions
Bury	Bury Depot	1 SITES	0 USERS	1 ADRESSES	EDIT
Stoke	Stoke Depot	2 SITES	1 USERS	0 ADRESSES	EDIT

The ‘Addresses’ button allows the setting up of alternative ‘Examination Premises Addresses’. These are available for selection when starting an inspection. This is a time-saver where common addresses are used as an alternative examination address.

You can view users attached to a site by pressing the “Users” button, where ‘n’ is the number of users that are attached to a depot. Users can view details attached to the depot such as their full name, what kind of access they have to the depot information, how long they have had that access for and how long they’ll have it for.

Settings > Depots > Stoke Depot

ADD USER TO DEPOT

Full Name	Date From	Date To	Access	Actions
Guest User	05/03/2021		Write Access	EDIT REMOVE FROM DEPOT

Users can be attached to depots through the use of the ‘ADD USER TO DEPOT’ button in the top left. Once clicked on, administrators can select pre-existing users and add them to the depot, giving them access to it. Users can have either write access, where they can change details about the depot, or read access, where all they can do is view the details. Administrators can choose how long they can have that access for, by inputting two dates: the date they have that access from, and the date after which they don’t have access.

A user’s access and access period can be changed at any time through a click of the ‘Edit’ button. All the administrator has to do is change the details and press the ‘Edit User Access’ button.

Users can have their access removed from a depot by using the ‘Remove from Depot’ button.

3.3 Email Alerts

There are several types of emails generated by the system:

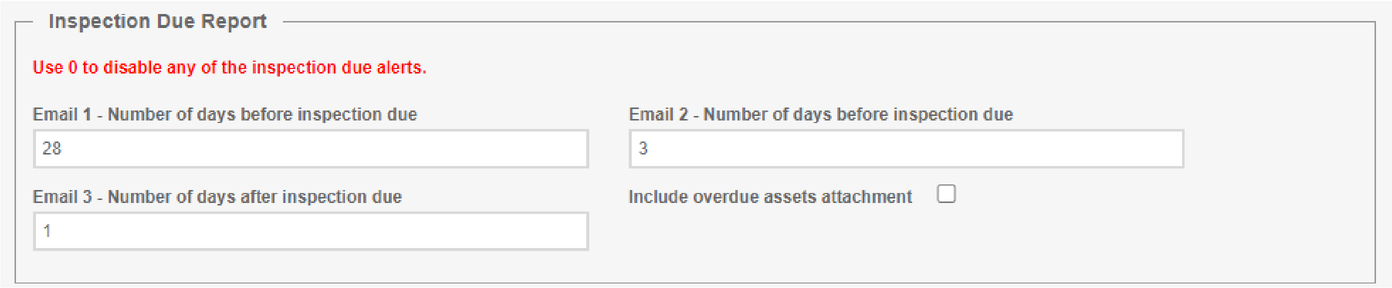
- Site inspection due
- Look Ahead Report
- Summary Repot
- Upcoming Inspections scheduled

In order for emails to be sent out, the ‘Settings > Themes > Edit Company Details’ page, the ‘Receive Emails’ checkbox needs to be ticked.

Where requested, emails are sent out to the depot and to customer sites.

3.3.1 Site Inspection Due Email

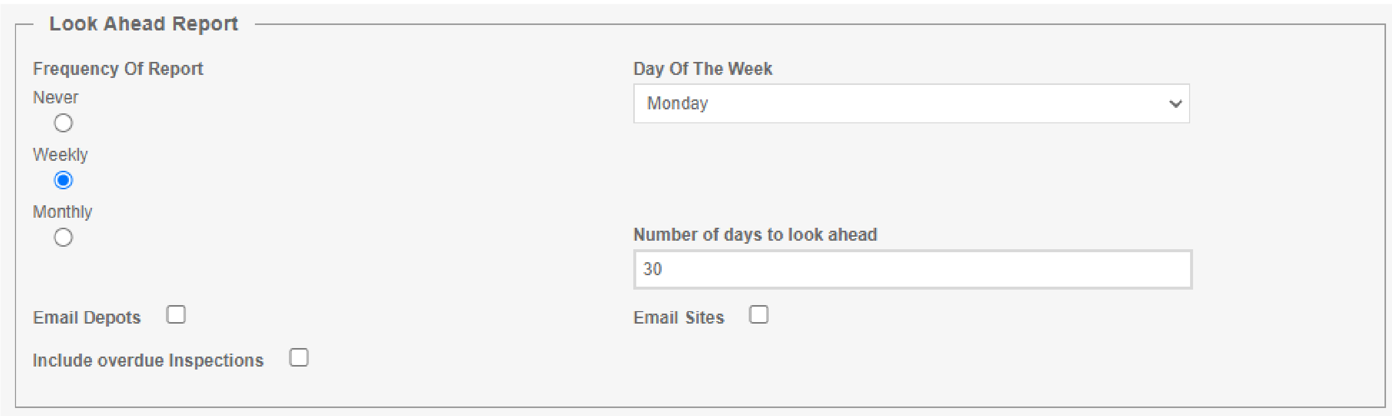
For the Inspection Due Report, 3 instances of the email can be sent and there is an option whether to include an overdue assets attachment.



By default, if set, emails are sent to sites and depots where the 'Receive Emails' option is selected.

3.3.2 Look Ahead Report Email

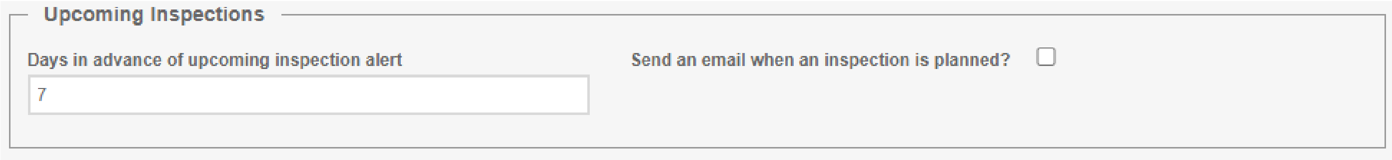
A weekly or monthly Look Ahead Report can be emailed, again with an option as to whether to include overdue inspections. The number of days to look ahead will identify items due or coming up for inspection in that time period. For weekly inspections, there is an option to choose which day of the week the report goes out. For the monthly inspections, the day of the month for reporting can be chosen.



There is an email over-ride for sites and depots.
An email is sent to the email address specified in the site.
A copy of the email can be sent to the email address of the inspecting depot for the site.

3.3.3 Upcoming Inspection Email

The 'Upcoming Inspection' email option is for scheduled inspections. There is an option to select whether an email is to be sent when an inspection is planned. Administrators can also control how many days before the inspection an informative email will be sent out by.



After editing those things, the administrator must press ‘Update’ in order for those details not to revert when the page is left.

3.3.4 Summary Report

The latest summary report for a customer site is sent to the site register. This report is in the same format as the Asset Register Summary report.

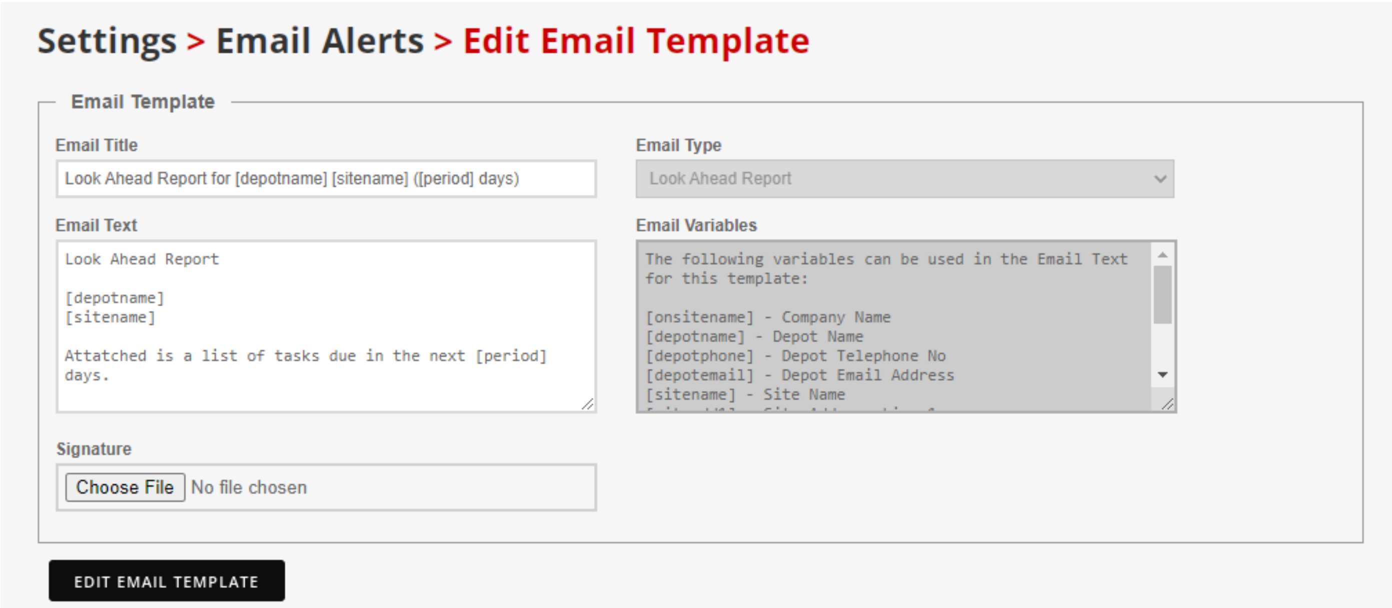
3.3.5 Email Templates

The contents of the email can be defined by an email template. There is a template available for each of the email types.

Email Templates

Email Title	Email Type	
Site Inspection Due in [period] Days	Inspection Due Report - Email 1	EDIT
Site Inspection Due in [period] Days	Inspection Due Report - Email 2	EDIT
Site Inspection Due in [period] Days	Inspection Due Report - Email 3	EDIT
Look Ahead Report for [depotname] [sitename] ([period] days)	Look Ahead Report	EDIT
Summary Report for [sitename]	Summary Report	EDIT
Upcoming Inspection at [sitename]	Upcoming Inspection	EDIT

On selecting a template, a screen is shown allowing the administrator to configure the email.



The email templates can be modified as required and can contain the following pre-set variables:

- [onsitename] - Company Name
- [depotname] - Depot Name
- [depotphone] - Depot Telephone No
- [depotemail] - Depot Email Address
- [sitename] - Site Name
- [siteadd1] - Site Address Line 1
- [siteadd2] - Site Address Line 2
- [siteadd3] - Site Address Line 3
- [duedate] - Inspection Due Date
- [period] - Number of Days until Inspection is due
- [signature] – where a signature can be uploaded and positioned on the email.

An administrator can edit the content of the emails at any time by clicking on the “Edit” button next to the Email title and type. Once they’ve done that, they can edit the email name, email title, email content and what the email variables are. After they get done editing, the changes will be saved and the user will be returned to the Email Alerts screen through pressing the “Edit Email Template” button.

3.4 Flexible Fields

We understand that many companies will have asset and inspection properties that are unique to them. Therefore, we have included the ability to add additional fields to either assets or inspections. This also enables different types of certificates and check lists to be produced.

These flexible fields will then appear when editing the asset or inputting an inspection whether you are using the website or application.

For flexible asset fields, the following details are entered:

- Field Name – how the field will appear when editing an asset.
- Field Type –This specifies what kind of field it is. It can be one of: Text Input (one line of text), Text Area (multiple lines of text), Date, Checkbox, Multi Checkbox (Used to allow

multiple checkboxes on the same line) or Multi Checkbox end (Used to identify that this is the last checkbox in a line).

- Product – Choose whether the flexible asset field will be shown for all products or only specific products.
- Mandatory entry required? – This will make the flexible field required and will not allow the asset to be modified until an entry has been entered.

For flexible inspection fields, the following details are entered:

- Field Name – how the field will appear when inputting an inspection.
- Field Type – This specifies what kind of field it is. It can be one of: Text Input (one line of text), Text Area (multiple lines of text), Date, Checkbox, Multi Checkbox (Used to allow multiple checkboxes on the same line) or Multi Checkbox end (Used to identify that this is the last checkbox in a line) and Dropdown (selection of one-of-many options).
- Inspection Type – This allows you to specify exactly when the flexible field should appear, on every Inspection Type, or just on one. By default, flexible fields are set to appear on every Inspection Type.
- Mandatory entry required? – This will make the flexible field required and will not allow the asset to be modified until these fields have a value.
- Check by Default? - This will make sure that for a checkbox, this inspection has a check selected as the default entry.

Administrators can add, edit or delete existing Flexible Fields by clicking on the 'ADD' or 'EDIT' or DELETE buttons.

Ordinal arrows appear on the left-hand side and allows the user to adjust the order of appearance of flexible fields.

3.5 Inspection Types

There are different types of inspections that can be carried out, and potentially a certificate created for each type. The wording corresponding to the type can be amended, and additional inspection types created.

When creating an inspection type, the administrator will need to create an:
- Inspection Code: This is a short code for the Inspection Type.
- Inspection Description: This describes what kind of inspection it is in a few words.
- Certificate Title: This appears at the top of the certificate.
- Report Text: This appears under the title on the certificate.

The administrator can then select:
- Whether a photo gallery will appear after the certificate.
- Whether this inspection type is to be excluded from the test schedule. This is useful when you do not want the test results of the inspection to affect the asset's test schedule. For example, there is a Tail Lift that has a LOLER inspection followed by a Weight Lift inspection a few weeks later, we do not want the next LOLER inspection to be affected by the Weight Lift inspection.

An alternative logo and accreditation logo can be set up for each inspection type. The depot logo will overwrite this logo, but this will overwrite the customer and site logo.

The Report Template can be:

- LOLER - includes all the required questions for a LOLER inspection
- PUWER - this is in addition to be able to use the General option for PUWER.
- GA1 - for European customers.
- UK Declaration of Conformity – where equipment is manufactured in the UK.
- EU Declaration of Conformity – where equipment is manufactured in the EU.
- PAT – A PAT test inspection will only show if the ‘Use Report Number’ is selected in Settings>Themes>Edit Company Details page.

A second page can be set up using the Report Template. Various examples are available.

LOLER includes all the required questions for a LOLER inspection.

When printing a PAT TEST certificate in the Site Register, all the asset inspections for a job will be grouped together into a PAT TEST certificate.

The EC / UK Declaration of Conformity are not ‘certifiable inspection types’, meaning they will not be downloadable via the main site register screen. Instead, when an inspection of the type EC / UK Declaration of conformity is performed, go to the site register and click on the IDNO of the asset in question. On the asset details page, any EC / UK forms will be displayed and downloadable.

A watermark can be added which will be a background image to the certificate.

Additional fields can be added to the inspection type in the flexible field settings.

3.6 <u>Themes</u>

There are three themes that can be modified presently:

- Company Details
- Company Logo
- Accreditation Logo

Company details include:

- The Company Name for the organisation shown on the reports.
- The Contact Name and Company Telephone number (optional).
- An Inspection Percentage is used to calculate the percentage of overdue assets required for the site to be overdue for an inspection.
- Selecting a Default Authenticator. This is a very useful feature to set up as it will prevent forgetting to set up an authenticator when filling in an inspection. The specification of an authenticator is a requirement of a LOLER report. This can be over-ridden by depot.
- Overwrite Site Register Limit Per Page. This affects the number of lines that are displayed on the web page.
- The Welcome Message for users to see when they log on.
- A flag to enable turn on the receiving of emails.
- An option to use report numbers or not. This is important for inspections and opens up the report number functionality in the system.
- A switch to identify whether the Inspector’s depot or Site’s depot is to be used as the inspection depot. Normally the Site Depot is used. This is useful when a third party is used to manage inspections.
- A switch to identify whether the mobile App will show the authenticator and job number fields on the settings only, or on each report line.

- An option to have each site to be required to have a Site Code attached.

  There are times when it would be very useful to change the page size, in other words, the number of items that will be displayed on a page. One situation is when you want to select the items that are printed on a summary report when the items would normally be spread across a few pages.

- The Company Logo allows the logo that is printed on the home page and certificates to be changed.

- The Accreditation Logo allows the accreditation logo that is printed on certificates to be changed.

3.7 Units of Measure

Units of measure are used to identify the loading applied, for example, to the Safe Working Load. This ensures a consistent method of identifying the different types of loading.

Units of Measure are added by selecting the ‘Add Units of Measure’. Enter in the unit-name and a description of it, and press ‘Add Units of Measure’. Administrators can also delete units of measure by pressing the ‘Delete’ button and pressing ‘OK’ on confirmation.

3.8 Users

This screen enables the administrator to add and edit users.

On selection of this screen a list of users is displayed. Click on ‘Edit’ to see the user details, ‘Change Password’ to reset the password and ‘Edit Permissions’ to alter what the user is allowed to access.

Each user will be given a username and password by the administrator that will give them appropriate access to the system.

3.8.1 To add a new user:

Go to Settings and then click on 'Users’ and then on ‘ADD USER’.

This will take you to a screen where you can input details for your new user.

The required fields are: First name, Last name, Username, Password, Confirm Password, Start Date and Email.

There are two optional fields: User Position and End Date. You can also change the format of how dates are displayed: ‘dd/mm/yyyy’ or ‘mm/dd/yyyy’ or ‘dd month yyyy’ or ‘month ddyyyy’.

Then click ‘ADD USER’.

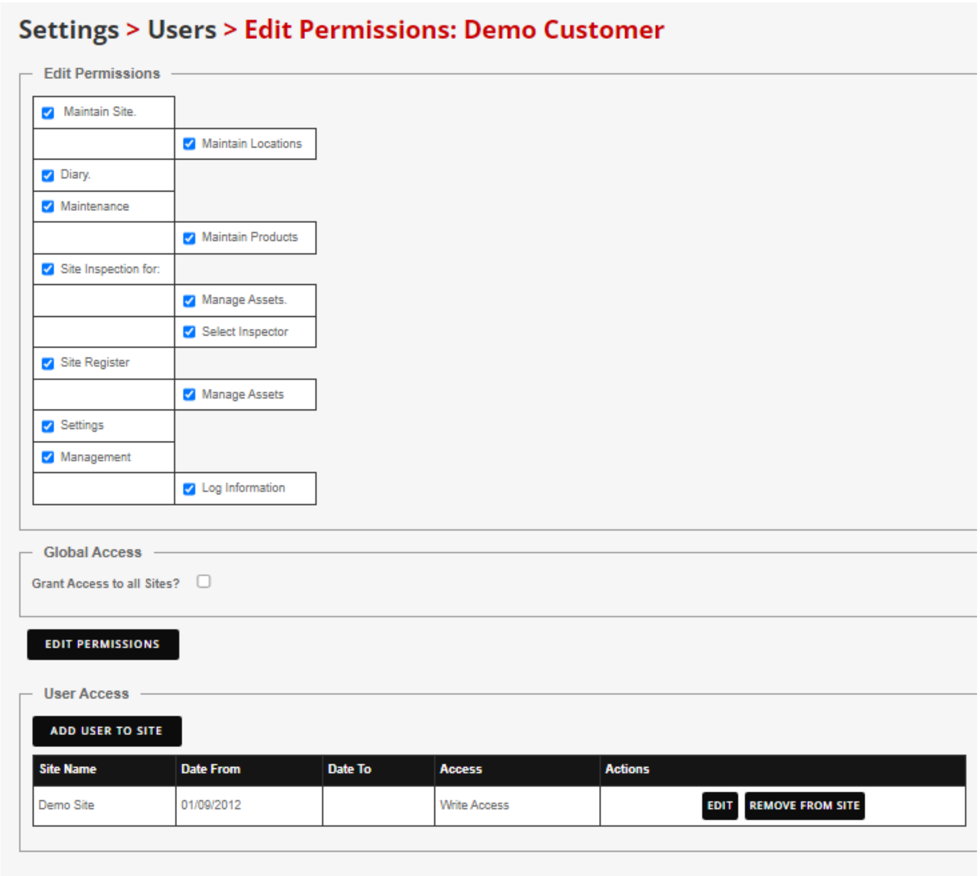
Once a user has been added, you then have to give them their permissions by selecting the ones you want the user to have.

Permissions:
Every user has permissions enabled that affect a user’s ability to access various parts of the system.

The various permissions are: ability to do Site Maintenance, ability to access the diary, ability to perform site inspections, ability to manage assets and the ability to access settings.

There is also the permission that grants a user global access to all sites, and like the permissions for a single site, allows you to decide whether they can edit the sites or just view them, and how long they can view or edit the sites for.

If you want to grant a user access to specific sites you can do so via the user access section, which also lets you edit/delete said users access to locations they may have access to.



The various permissions give the selected user the ability to:

- Manage Site Maintenance.
- Access the Diary.
- Access the Maintenance screen.
- Perform Site Inspections.
- See the Site Register within which the permission to grant access to edit asset details such as location.
- Access Settings and the Maintenance screen.
- Access the Management screen.
- Access the Log Screen.

Once the permissions have been selected, where they are to be applied is then selectable.
The Manage Locations and Manage Products are separated out as these are permissions needed to access the App locations and products modules.

The Global Access option permission grants that user global access to all sites. If chosen, then choose what kind of access (read or write) and the date from and date to. Then click on 'EDIT PERMISSIONS'.

If an engineer is only allowed access to specific sites, then click on 'ADD USER TO SITE' to add access to each site in turn.

This will also allow whether they can edit the sites or just view them, and how long they can view or edit the sites for in a similar way to Global Access.

After editing permissions, pressing the "Edit" button saves the changes and reloads the page rather than going back to the previous one. To exit this page and get back to the users screen, you have to use the breadcrumbs at the top to go back into Settings -> Users.

3.8.2 Edit Permissions

Once a user has been added, you have to give them their permissions by clicking on "Edit Permissions" and selecting the ones you want the user to have.

3.8.3 Edit User

In the 'Edit', if you have a picture of a user's signature on your computer, you can upload it to their data, allowing that signature to appear when they need it, rather than having to print documents and add it to them manually later.

3.8.4 Change Password

In order to change a user's password, simply press the 'Change Password' tab and write the changed password into the clear text box.

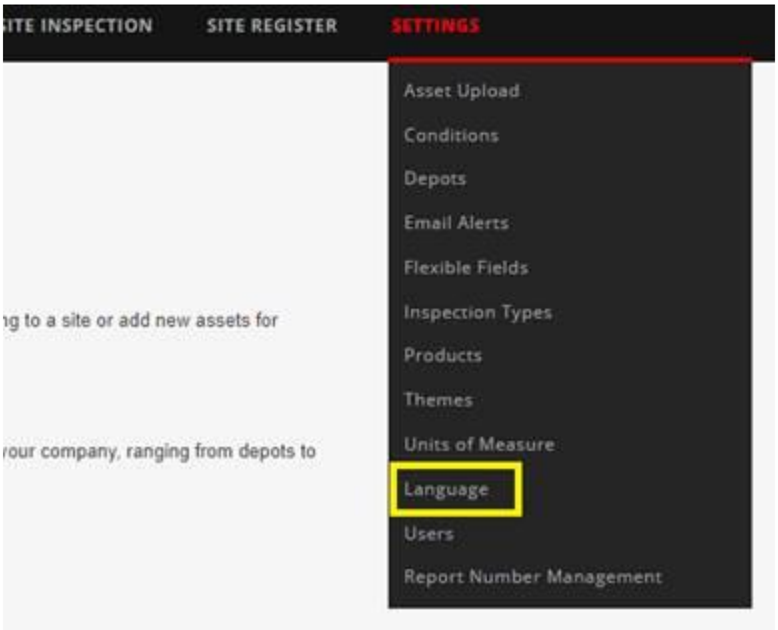
3.8.5 Delete User

Should you wish to remove a user, press the 'Delete User' tab. You'll get prompted if you're sure or not. If you are, press OK, and the user will be hidden from the system. If you aren't, press cancel, and nothing will have changed. Hidden users cannot be used for future inspections, but historical inspections will always show who did the inspection, even if they are hidden.

3.9 Language

The terminology used in the system is not always the most appropriate for each situation.

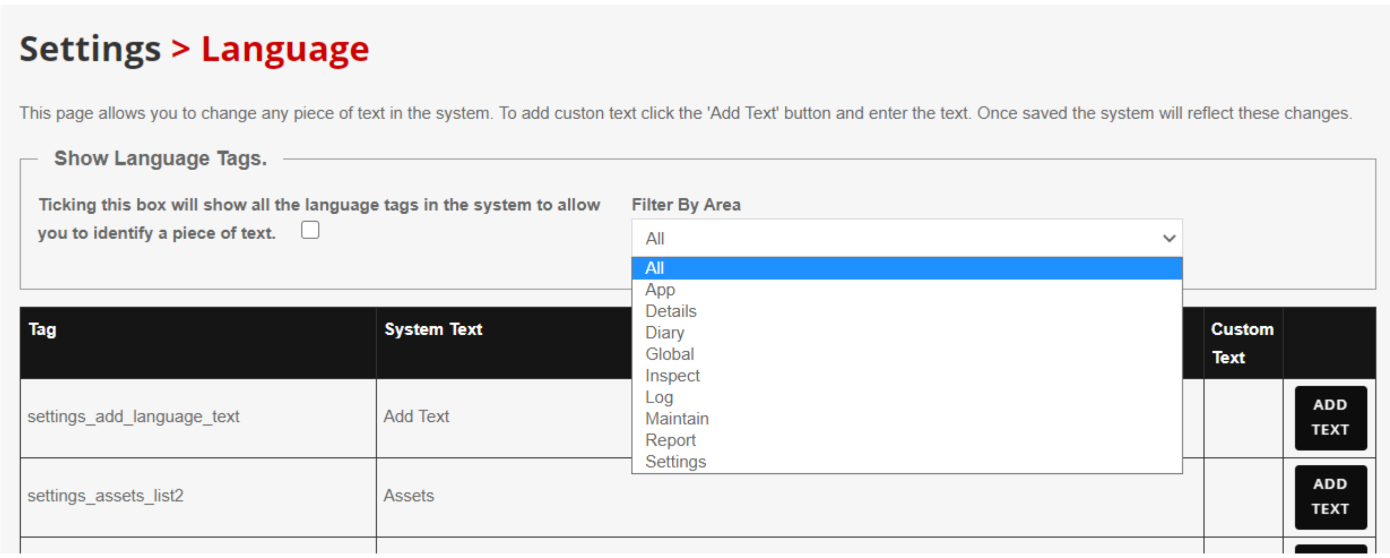
So, we have included a language module in the settings that will allow the administrator to change the system words seen.



The link can also be seen on the ‘Settings’ page:

On selection of ‘Language’, if the user has access granted, then an alternative wording can be entered.

This is how the language front screen will look:



In the ‘Filter By Area’ box, you can select which area of the system you want to see to be able to change the language text for.

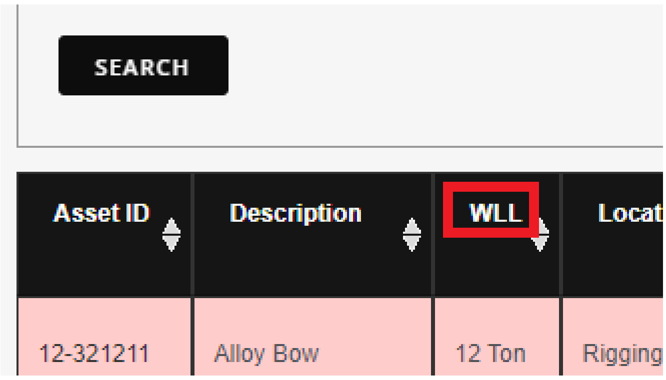
If the language tag is ticked, for the logged in user, you can go to the screen that you want to change and see the language tag set up for it. Alternatively just search for the text you want to change.

So for example, if you want to change the abbreviation SWL on the site register screen to WLL (Working Load Limit), look up the tag used. In this case it is 'details_swl':

Go back to the Languages screen, turn off the Language tags and find the details_swl entry, then click on the 'ADD TEXT' button.

Enter in WLL and press on the 'ADD CONDITION' button.

The alternative terminology will now show up on the languages screen for editing or deletion. The replacement will show in the place it was intended:



Note. Language tags may be in place across several screens, so all the places using that language tag will be affected.

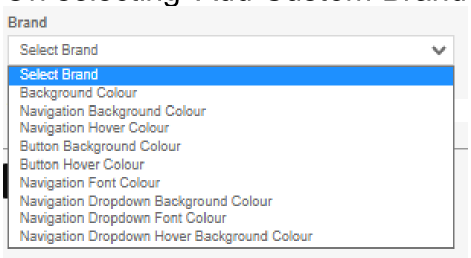
3.10 Website Custom Branding

This feature allows the administrator to change the logo and colours on the website. It will also be possible to log in directly into the OnSiteForm website from an external website if certain conditions are met.
When you first click on the Website Customer Branding link, there will be a screen looking like:

The two options are:

a) Add Custom Brand

On selecting 'Add Custom Brand' you are able to select branding colours for the following options:

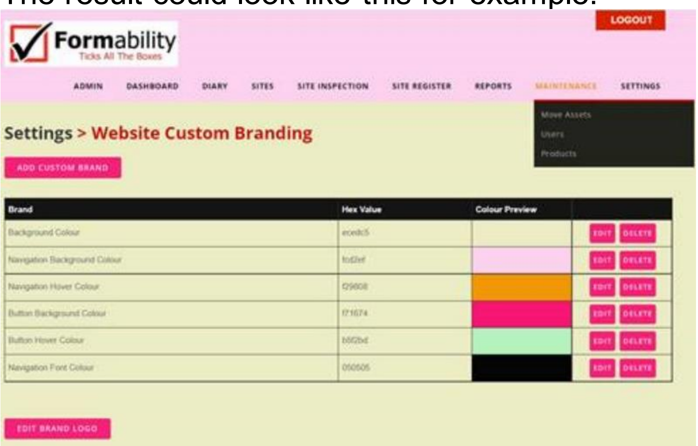


Click on the Hex value entry, select the colour using the colour pickers, or use the hex value if you know it. Then click on the circular colour icon on the bottom right-hand corner to save the colour changes.

b) Edit Brand Logo

On selecting 'Edit Brand Logo' you are able to select and upload the logo you want to choose.

The result could look like this for example:



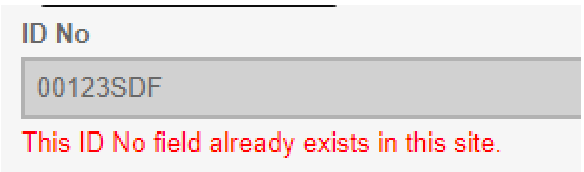
4 Sites

An asset register with associated inspections can be held against individual sites. On this screen, the administrator can create a new site, amend an existing site or view a site that he/she has access to. The administrator or inspector may be able to view the site details if their user permissions allow them to, or if they have a specific site read access allowance.

When creating a new site, the following details can be created:

- Site name
- Site code
- Site Address Details
  - Depot
  - Address
  - Postcode
- Site Contact Details
  - Site Email
  - Phone and Mobile numbers
- Site Contact
- Site Colour code
- Customer order number
- Your order number
- Prevent Duplicate Asset Id's checkbox.

  It is important for some sites to disallow duplicate asset numbers. If the 'Prevent Duplicate Asset Id's' is set, then an error message is shown if a duplicate entry is attempted:

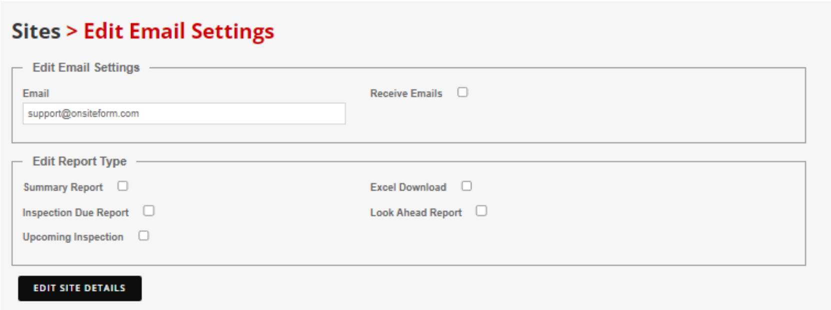
- Site and accreditation logo (that overrides the company site and accreditation logo)

The user may also maintain:

- Site Comments
- Email settings
- Customer site users as allowed in user settings
- Locations that can be set up in a hierarchy.

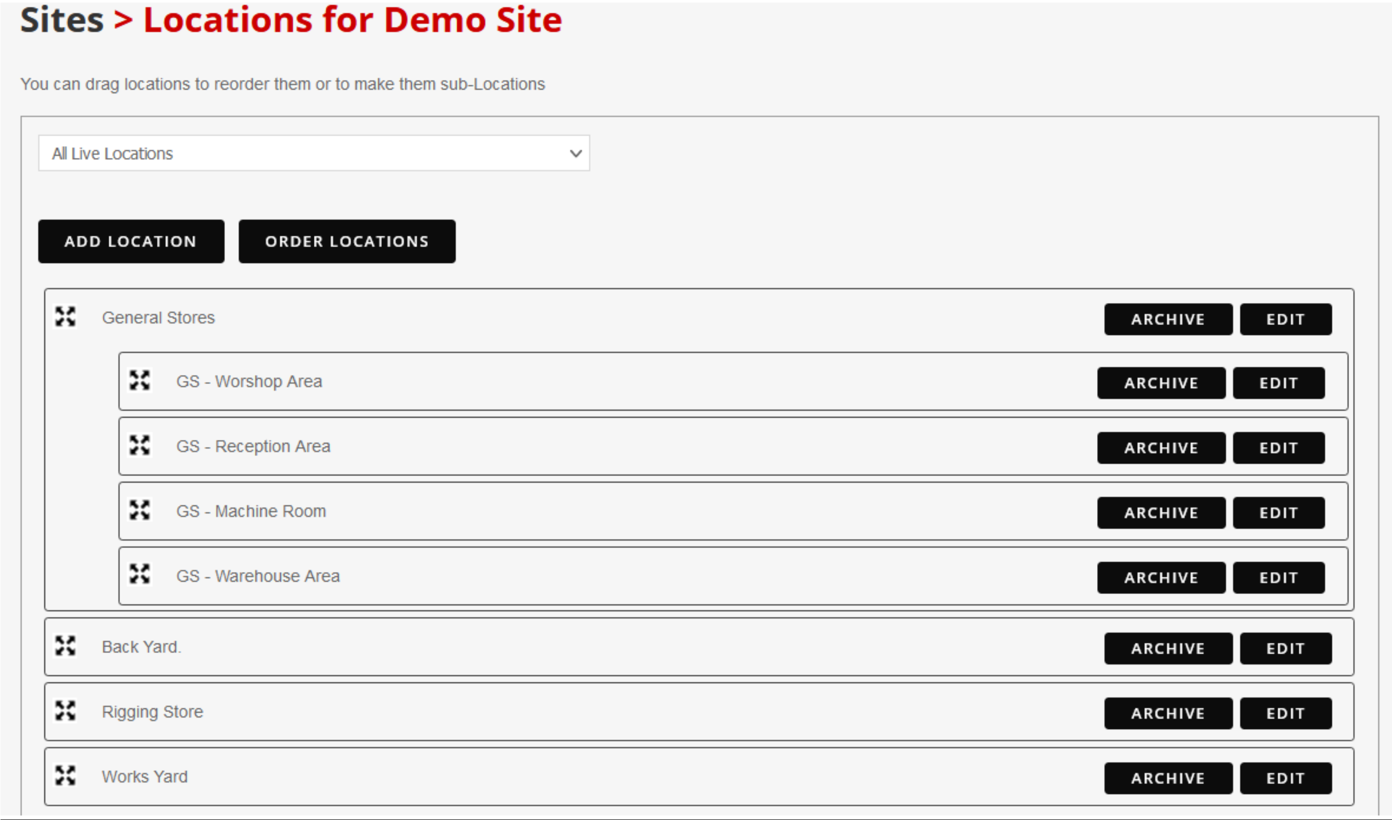
4.1 Email Settings

The user is able to select which email reports are sent to the customer:



4.2 Site Locations

The site locations page works the same way as the products where each location can be moved from one sub-location to another. Locations can be archived so long as the assets against that location are archived first.



There is also a drill down to maintain colour code history details. The colour code history details are not populated automatically, so they may not correspond to the colour code history details. This drill down will consist for this site of a list of ‘from’ and ‘to’ dates, and the colour code associated for that period.

4.3 Site Users

There is also a drill down for specific user allocations. This will allow depots to allow read and/or write access to that site for allocated users for a particular time period and will allow access to all locations or only certain locations.

Location codes can be created that are linked to assets, when adding or amending assets. Locations can be in a hierarchy.

In order to add a location to the site, click on the 'View Locations' tab. Then, right click on location and select "Add New Location". Then, you insert the name of the location, its address and its postcode and press save, and the new location is added.

You can allocate users to the site by clicking on the 'View Users' tab and pressing 'Add New User' once inside. Then, you select the user you want to add, whether you want them to be able to edit your site or just view it. You can only add existing users, and not create them here. Once a user has been added to the site, you can edit what they can do with the site and how long they can do that for at any time by pressing the "Edit" button. If you want to remove a user from a site, press the "Remove from Site" button.

4.4 Site Products

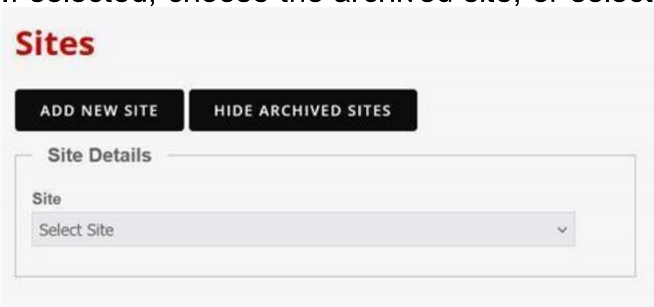
The product list can get very big.
When adding an asset, it takes time to scroll down to select the product required. Some sites have a limited range of products, so scrolling through the full list is more work than needed.

This selection allows you to restrict the products used in a site to the ones relevant to the site. So, when it comes to adding an asset, only the relevant products for that site will be shown.

4.5 Site Archive

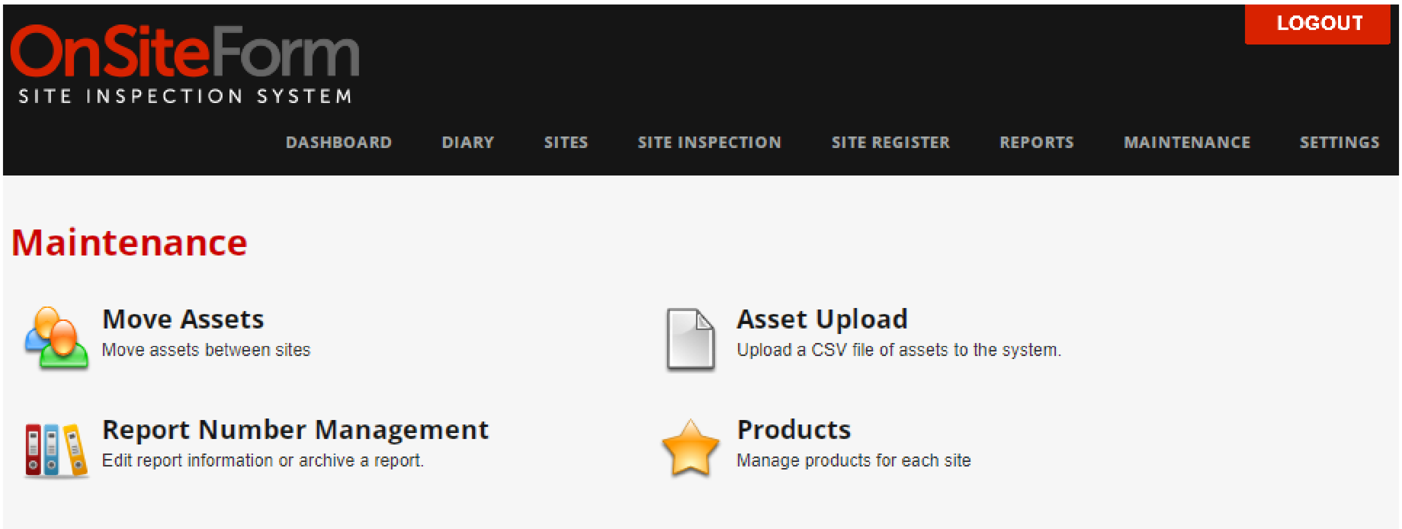
There are occasions when a site looks like it has been finished with and it is archived.
If the customer comes back and you want to re-instate an archived site, this can now be done. The 'SHOW ARCHIVED SITES' feature can be enabled on request.

If selected, choose the archived site, or select HIDE ARCHIVED SITES.



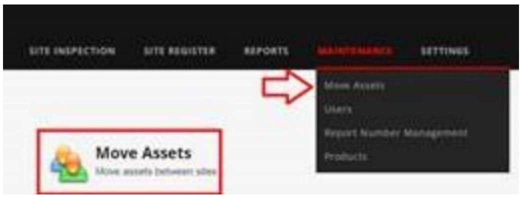
To reinstate, select the 'REINSTATE SITE' Button.

5 Maintenance

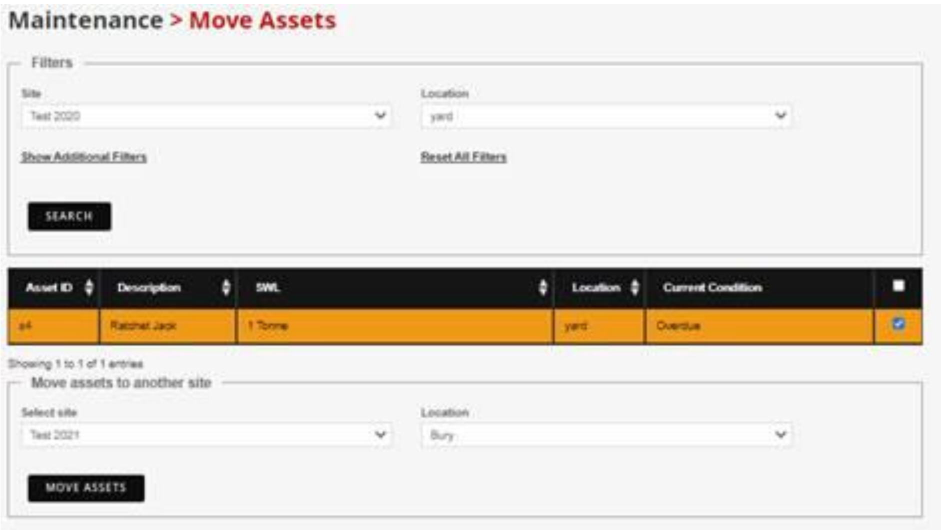


5.1 Move Assets

This option allows an authorised person to move assets between sites.
This can be required for example when equipment has been moved from one site to another.



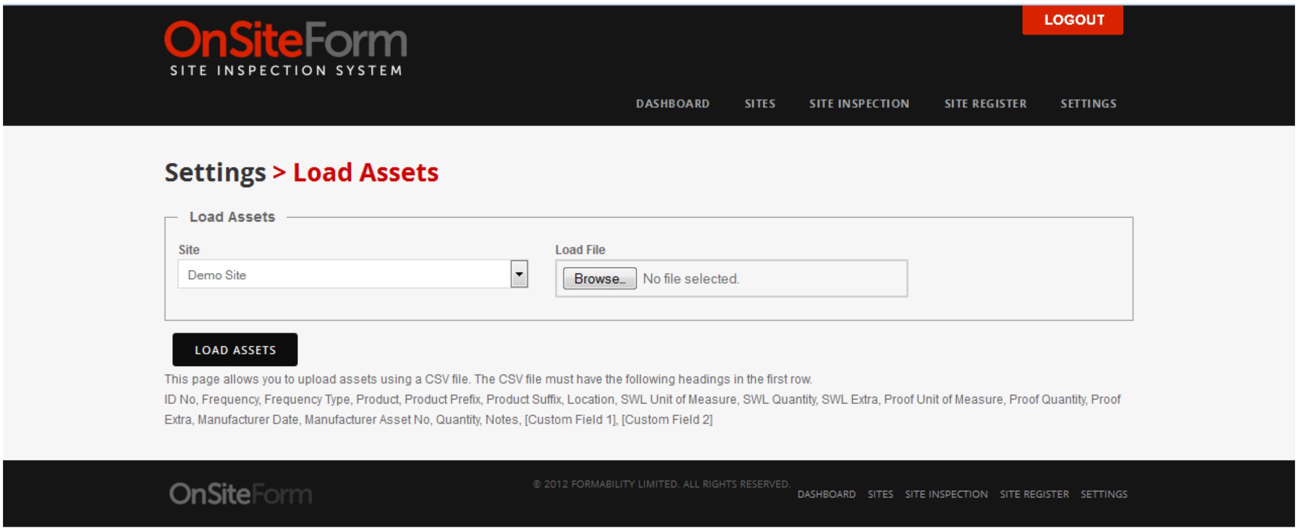
The authorised person selects the site and location that the assets are to be moved from, selects the assets in question, then selects the site and location where the assets are to be moved to, then click on MOVE ASSETS. For example:



This will move the assets with their associated inspection history to the new site and location.

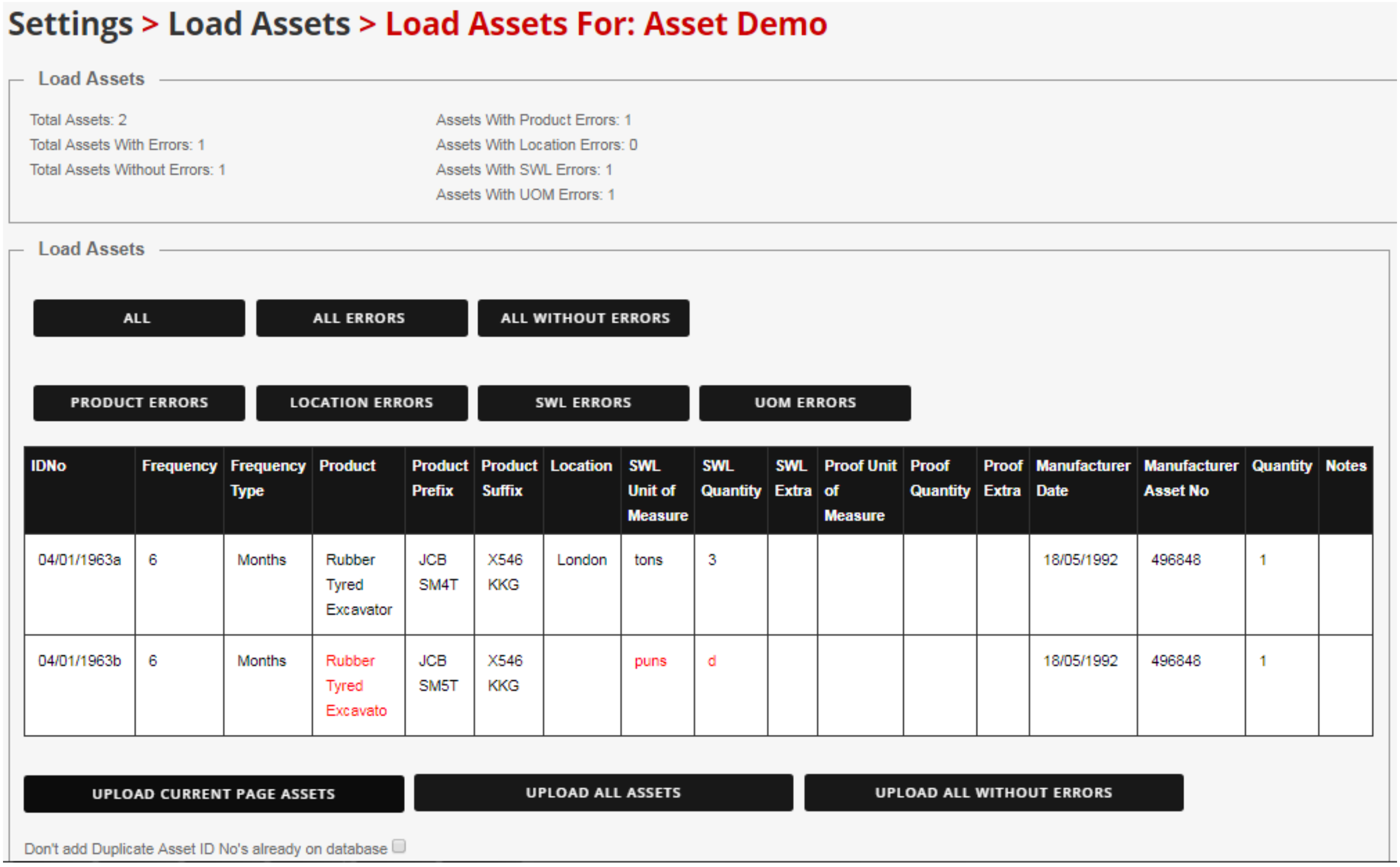
5.2 Asset Upload

When starting, you may need to bulk load assets. You can do this using the Site Inspection screen and ‘Add Multiple Assets’, or through creating and uploading a CSV file to the site. The information needs to match the system, meaning you will need the Products, Units of Measure and Site Locations set up before you can load the information. There is often quite a bit of work creating the product prefix and suffix entries in the CSV file, which with the product name create the fill asset description.
A template CSV is provided in the initial “load assets” screen.



If the CSV matches the system and has uploaded successfully, you will then be directed to a control screen which contains all your assets in a table, whereas if the CSV doesn’t match our system, you will be informed as to which area has an issue.
This section will inform you as to which assets have been identified as containing an error regarding location, product, SWL and UOM. An asset will contain an error if the location/product/UOM does not match with any preset variables or the SWL contains an invalid character. Sections that contain an error will be highlighted in red.

Note: Assets with missing variables are not categorised as an error.



Settings > Load Assets > Load Assets For: Asset Demo

Load Assets

Total Assets: 2
Total Assets With Errors: 1
Total Assets Without Errors: 1

Assets With Product Errors: 1
Assets With Location Errors: 0
Assets With SWL Errors: 1
Assets With UOM Errors: 1

Load Assets

ALL | ALL ERRORS | ALL WITHOUT ERRORS

PRODUCT ERRORS | LOCATION ERRORS | SWL ERRORS | UOM ERRORS

IDNo	Frequency	Frequency Type	Product	Product Prefix	Product Suffix	Location	SWL Unit of Measure	SWL Quantity	SWL Extra	Proof Unit of Measure	Proof Quantity	Proof Extra	Manufacturer Date	Manufacturer Asset No	Quantity	Notes
04/01/1963a	6	Months	Rubber Tyred Excavator	JCB SM4T	X546 KKG	London	tons	3					18/05/1992	496848	1	
04/01/1963b	6	Months	Rubber Tyred Excavato	JCB SM5T	X546 KKG		puns	d					18/05/1992	496848	1	

UPLOAD CURRENT PAGE ASSETS | UPLOAD ALL ASSETS | UPLOAD ALL WITHOUT ERRORS

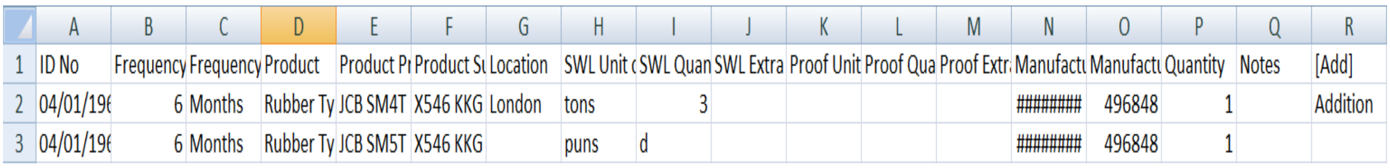
Don't add Duplicate Asset ID No's already on database

Using this screen, you can look at all assets that have a certain error identified, as well as edit any item via clicking the section you wish to edit. An item cannot be edited to contain an error.
You can toggle through assets with regards to which errors they contain, if any, via the buttons above the table.

After reviewing your assets, at the bottom of the screen,you can chose to upload all assets, current assets on page or all assets that contain no errors. Assets with errors can still be uploaded if desired.

Custom flexible fields can also be implemented in a bulk asset upload.

In your CSV file in the R column, you can add your custom fields to match what you would have set up in the flexible fields section (section 3.5 – page 12).
These additions must be contained inside square brackets and will be included in the table in order for you to review and edit.

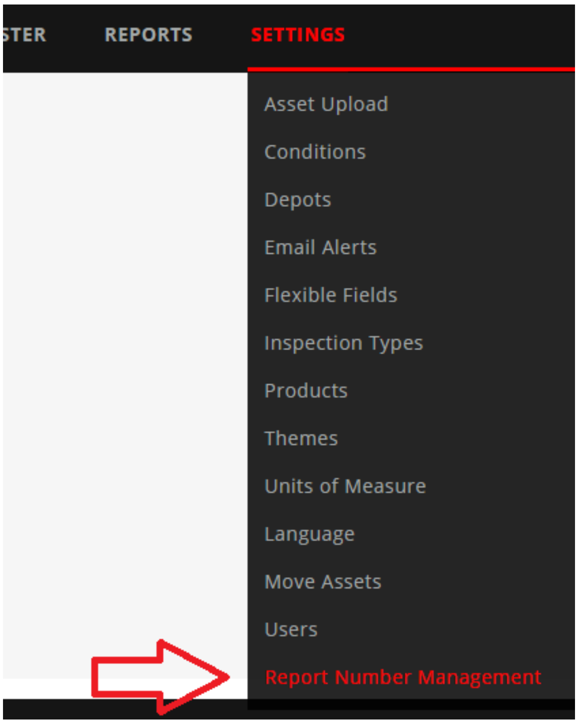


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	ID No	Frequency	Frequency	Product	Product Pr	Product Su	Location	SWL Unit (	SWL Quan	SWL Extra	Proof Unit	Proof Qua	Proof Extr	Manufactu	Manufactu	Quantity	Notes	[Add]
2	04/01/196	6	Months	Rubber Ty	JCB SM4T	X546 KKG	London	tons	3					########	496848	1		Addition
3	04/01/196	6	Months	Rubber Ty	JCB SM5T	X546 KKG		puns	d					########	496848	1		

It is possible to add and inspect individual assets as well as inspecting assets in bulk.

5.3 Report Number Management

This section only appears if you opted to use Report Numbers in the Themes>Edit Customer Details section.



This section allows you to change the job number and the date of existing examinations, which also changes the report number. Changing the date here does not change the date of the individual inspections themselves, but does change the date where the Report Date appears on the PDF reports. You can also archive reports, preventing you from selecting them for new reports, but existing reports will not become corrupted.

5.4 Products

Assets in the OnSiteForm are set up against standard products. Products are grouped together to help with their selection.

New products can be added by right clicking on ‘Product’, or any of the folders and selecting ‘Add New Product’. Then, the user inserts the name of the product, presses okay, and the new product is added to the list. Clicking on ‘Product’ inserts the new product at the bottom of the list, while clicking on one of the folders puts it at the bottom of the folder.

Products can be moved around the list by left clicking on it and dragging it to the location the user wants it to be in.

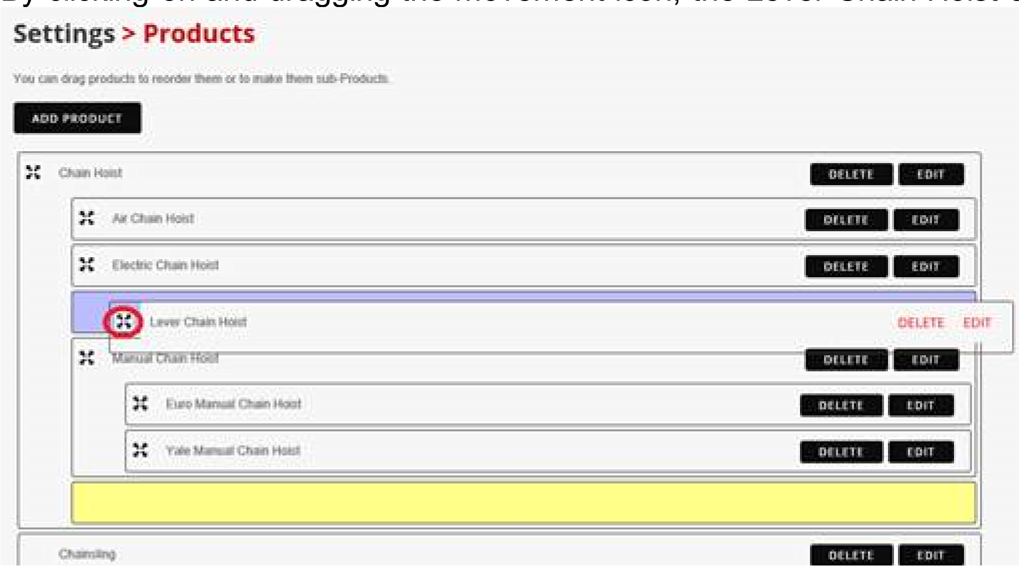
When adding or editing a product, you can set up a default setting for:

- Inspection frequency (a number)
- Frequency Type (Days, Weeks or Months)
- Inspection Type
- Unit of measure.

When adding an asset, a product is selected. Once selected, the settings identified above are initially applied to the asset.

So, for example, if a 'Crane Checklist' is set up against product 'Crane', when adding an asset with this product, the 'Crane Checklist' becomes the default inspection type instead of the default 'Thorough' inspection type.

By clicking on and dragging the movement icon, the Lever Chain Hoist can easily be repositioned:



The yellow area shows where it came from and the blue area shows where it is going.

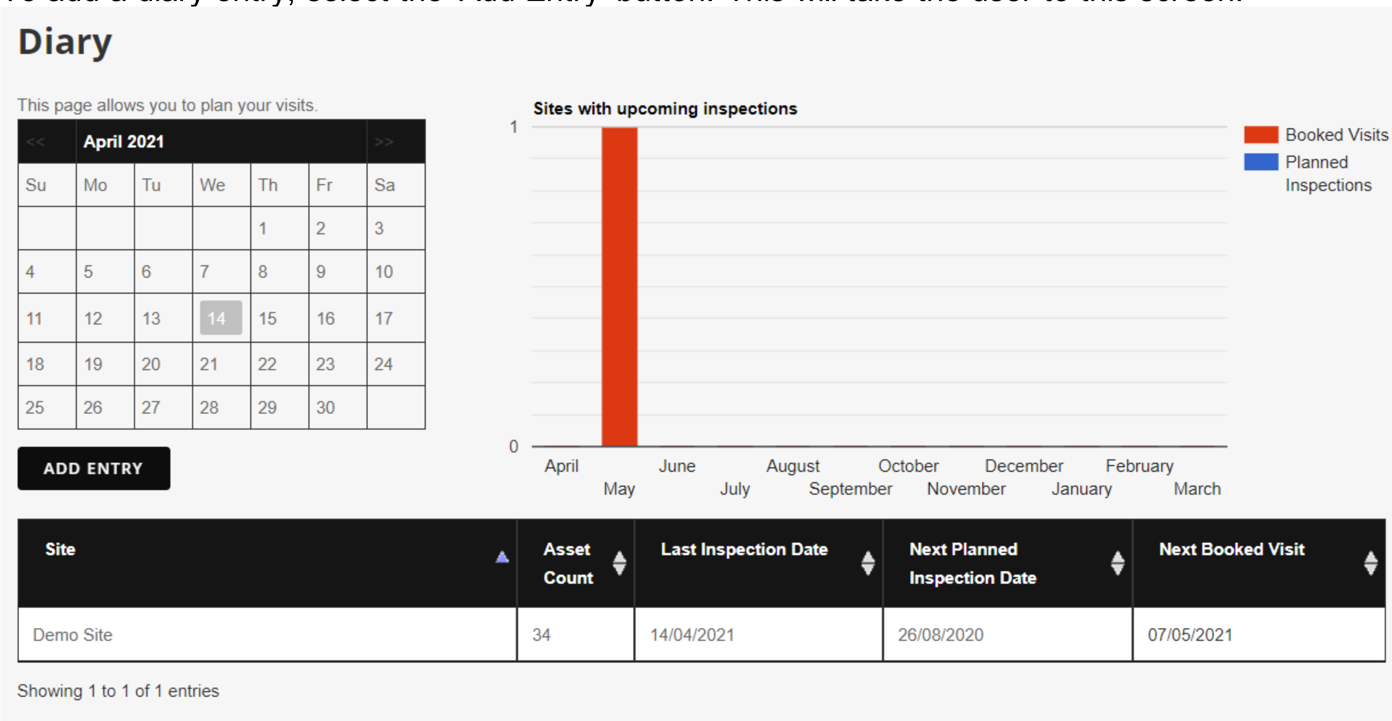
The ability to edit or delete is managed by a button.

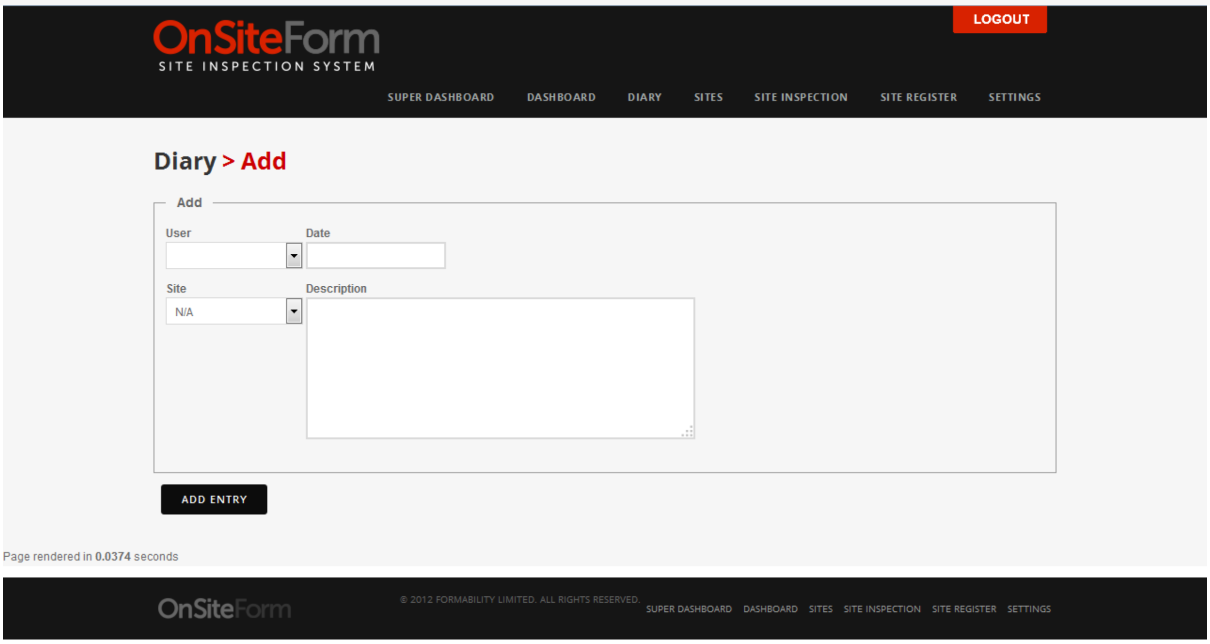
6 Diary

The diary will enable inspections to be planned by inspector and site for a particular date. It also contains a control panel to help identify which inspections are due to be carried out. New diary records can be added and existing records maintained. An alert is sent to the inspector according to the inspector's settings. Users can go forward and back between the months by clicking on the arrows to the left and right of the month and year.

The page will highlight the current date with a grey background and white number, to contrast with the white backgrounds and black numbers of the other days. If any entry has been created, the date number turns bold.

To add a diary entry, select the 'Add Entry' button. This will take the user to this screen:

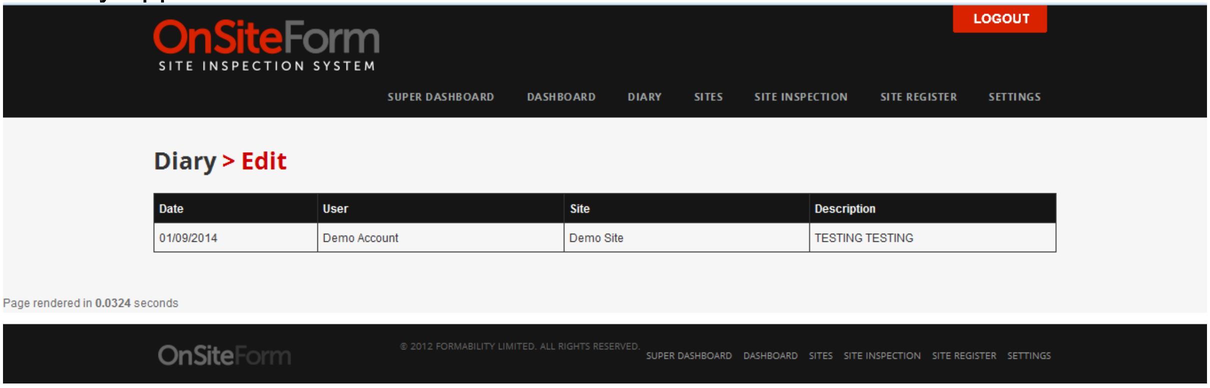




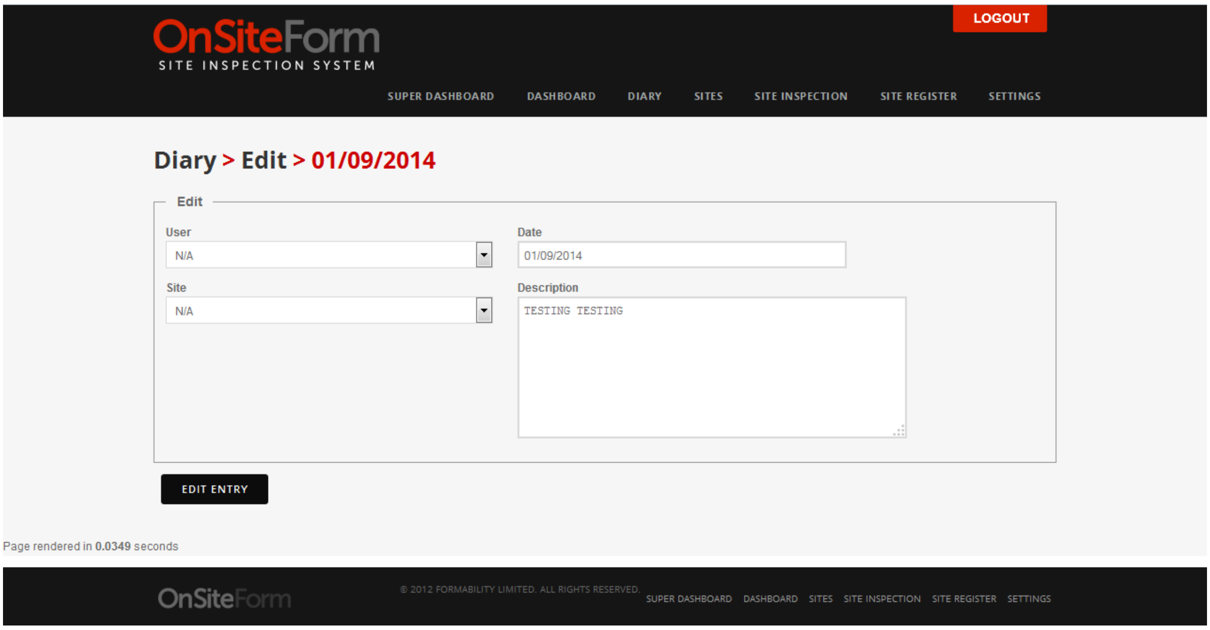
After filling in the fields, all the user has to do is press the ‘Add Entry’ button, and a diary entry will be created with the information that was inputted. This will also update the ‘Next Booked Visit’ on the Control Panel.

If on the ‘Settings > Themes > Edit Company Details’ page, the ‘Receive Emails’ checkbox is ticked, then if on the ‘Settings > Email Alerts’ page, under the ‘Upcoming Inspections’ section, the ‘Send an email when an inspection is planned?’ is ticked, an email alert in the format as specified in the Upcoming Inspection ‘Email Template’ format will be sent to the email address of the inspector user selected.

To edit an existing diary entry, click on the emboldened date number. Then, a list of diary entries for that day appears.



To edit the entry, one can click on the entry, and will be taken to the edit page, where they can be edited.

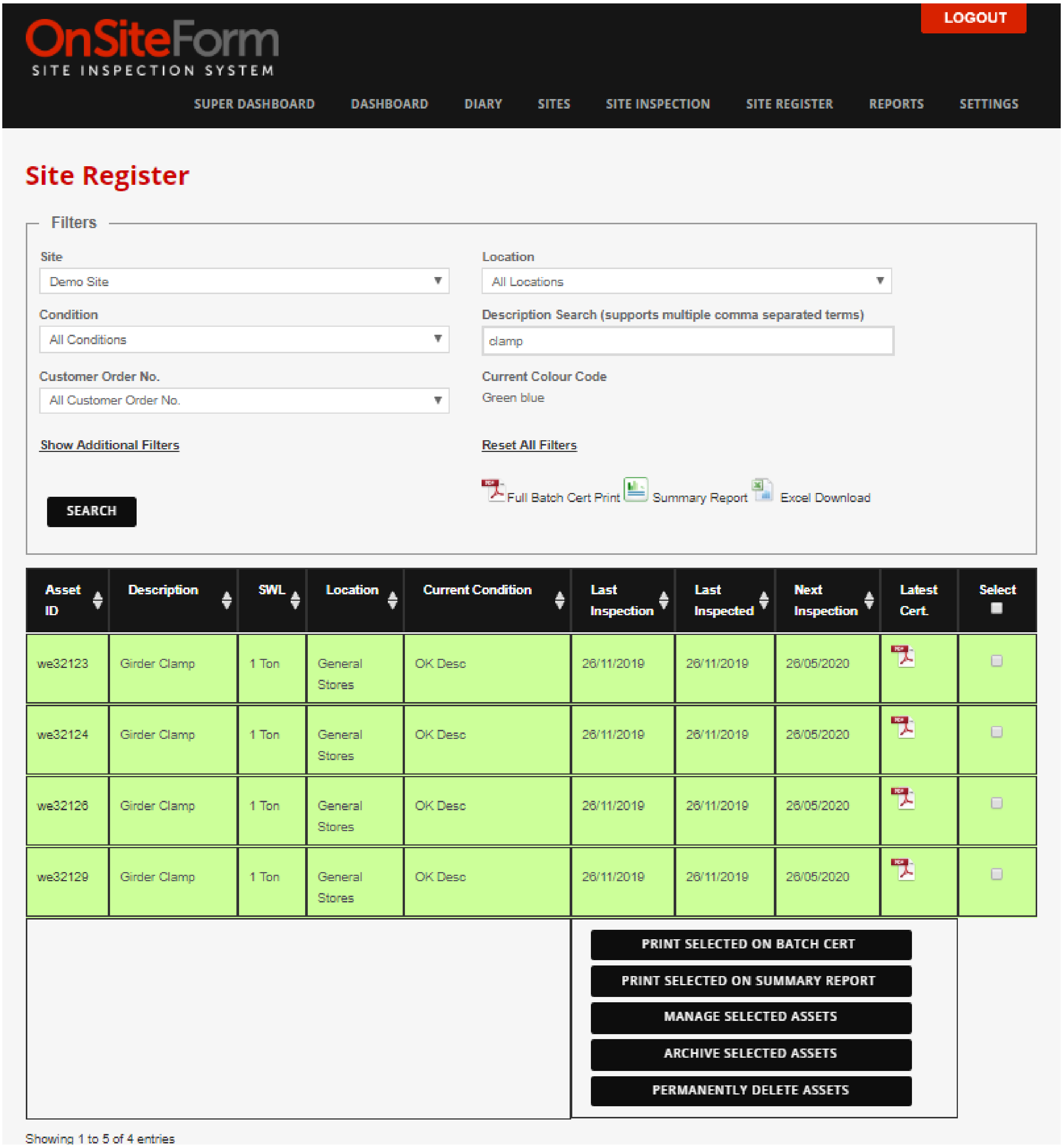


Once the edits have been saved, the user will be returned to the regular diary screen.

In order to remove a diary entry from the diary, change both the user and the site to N/A, and delete anything in the date and description boxes.

7 Site Register

This is a screen that all users with a login have access to. It provides various reporting options on the site register for a particular site.
It is split into a standard Site Register and a Global Register, allowing a search across all sites.



7.1 Site Register Filters

There are several filters that can be selected to help the user find the information needed. By clicking on the ‘Show Additional Filters’ link, more filters are shown.

The user chooses from the various filters:

- Site
- Location
- Condition
- Description (which includes serial number) that can contained various values separated by a comma
- Customer Order No.

Under additional Filters that can be hidden, we also see the ability to select:

- Status (In-Date or Overdue)
- Inspector
- Inspection date range
- Inspection Type
- Product name
- The order in which information is to be shown.

The assets for that site that meet the selection criteria are displayed.

It is helpful to be able to clearly see the last inspected date, rather than when the last inspection was carried out.
The difference occurs when at the last inspection, the asset was not found or some other ‘non-certificated’ status such as ‘Not Accessible’, where the item can be seen but could not be inspected due to its location.

In the example below, the item was inspected on 09/11/2019 and another inspection was carried out 10 days later where it could not be found.
The next inspection date is therefore 09/05/2020 on a 6-month inspection and the last inspected date is 09/11/2019, although on its last inspection it was not found on 19/11/2019.
The latest cert is for the inspection on 09/11/2020.

Asset ID	Description	SWL	Location	Current Condition	Last Inspection	Last Inspected	Next Inspection	Latest Cert.	Select
12-321211	Alloy Bow Shackle	12 Ton	Rigging Store	NF Desc	19/11/2019	09/11/2019	09/05/2020		

7.2 Summary Reporting

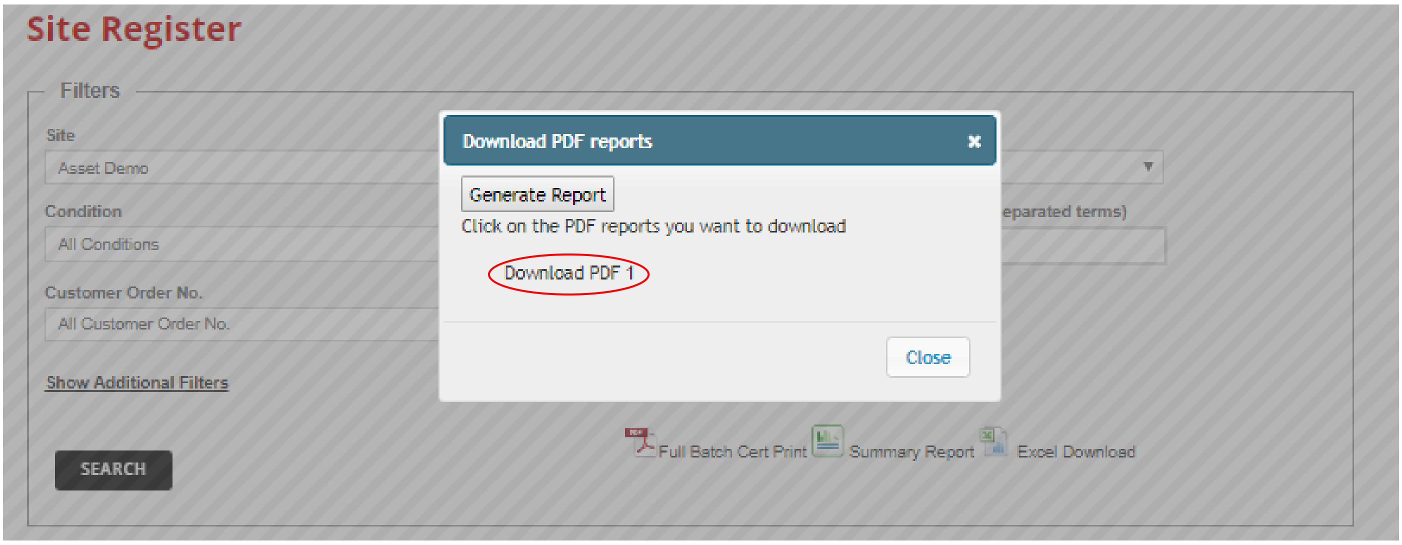
Various summary reporting options are available:

- Batch Cert Print: This is a batch report of all the individual certificates that can be printed that meet the selection criteria.
- Summary Report: A report of all the items that make up the selection report, with 2 lines per asset.
- Excel Download: This will produce a spreadsheet of the selected items that can be used for further analysis.

7.3 Batch Cert Print

Once the Batch Print has been pressed, a progress bar will appear to indicate how many files have been generated.

After the batch processing has completed, a download button will appear, which will show a dialog in the centre of the screen with all the files that can be downloaded.



On clicking ‘Generate report’, a download PDF file is produced. Click on this to download the report that has been generated.

7.4 Site Register Inspection History

Individual items can be examined from clicking on the Asset ID.

In this screen:

- The inspection history can be seen by clicking on the ‘SHOW INSPECTIONS’ tab. This shows the asset history for that asset and additional documentation that can be added as required. By clicking on the PDF symbol, the individual inspection certificate for that asset and inspection date is displayed and can be printed. The record can be ‘Deleted’ (hidden) if the user has the appropriate access.

- Additional documentation loaded against the asset can be seen on the 'SHOW DOCUMENTATION' tab.
- A history of movements (after 20th May 2024) can be seen by clicking on the 'SHOW ASSET TRACKING' tab.

7.5 Inspection Certificate

The certificate printed is in the default layout and shows the information at the time of the inspection and will not show changes made at a later date.
The default 'Thorough' document is designed to meet LOLER requirements. This default document has been audited by LEEA to confirm that it conforms to these standards. Other document types can be created. A common one is PUWER. Other types of certificates have also been created for different types of inspection such as checklists for vehicle inspection, ladders and even training certificates.

7.6 Additional Documents

Additional documents can be added by clicking on 'Add Document'.
Choose the file to be updated, include a description and a document date, then upload the document. These reports can be downloaded by clicking on the 'Download' button or the filename and can be removed by clicking the 'Delete' button if the user has the appropriate access.

The last column contains a check box that allows the ability to report or maintain details in batch.

7.7 Asset Movement Tracking

This shows the history of asset movements between locations and tracks movements between locations and sites.
For example, when locations are used for vehicle registration numbers or people's names.
When an item is moved between locations, the system will now log the location movement, when it was made and who did it.

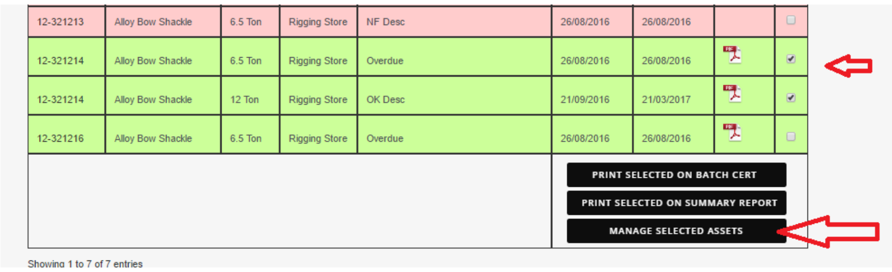
7.8 Site Register Check Box selection

On the right-hand side there is a checkbox for each item.
On the bottom of the screen at the right-hand side, depending on the user permissions, there are the following options that will be applied when clicked against the items checked above:

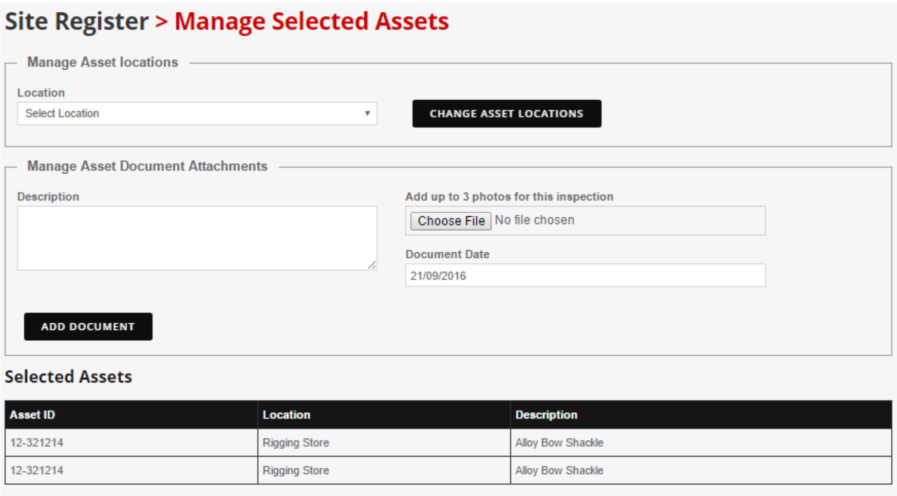
- PRINT SELECTED ON BATCH CERT
- PRINT SELECTED ON SUMMARY REPORT
- MANAGE SELECTED ASSETS
- ARCHIVE SELECTED ASSETS

7.8.1 Manage Selected Assets

The 'Manage Selected Assets' button allows the user to move multiple items between locations or allows the user to allocate a document to multiple items:



For the 2 items selected, they can be moved to a new location or have a document added against them.



7.8.2 Archive Selected Assets

Items on the register can also be archived.

If the user has access to the function via the permissions settings, the user can also archive assets in bulk.

If the wrong asset was selected to be archived, the process can be reverted if the user navigates to the additional filters section – Status – Archived Assets. This will then allow the user to select archived assets in order to revert back to the previous state.

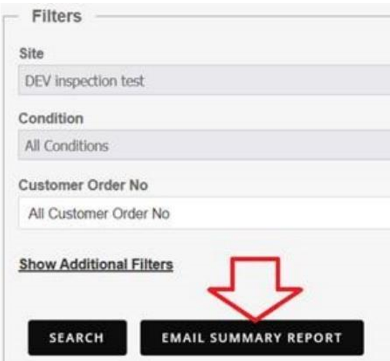
7.8.3 Permanently Delete Assets

Items on the register can also be permanently deleted. When this happens, they are removed from the site register and are not charged for.

Asset ID	Description	SWL	Location	Current Condition	Last Inspection	Last Inspected	Next Inspection	Latest Cert.	Select
9265/10730	OHTC - STREET CRANE	Ton		No Defects Found	06/09/2019		06/03/2020		
aaa	Eyenut								
aaaaaa	Eyenut								
aaasss	Girder Clamp								
[illegible]	Catalyst Sampling Rig	225 Kg		Defective	18/07/2018		18/01/2019		
sasas	Eyenut						18/01/2019		

7.8.4 Email Summary Report

If the user has access to the function via the permissions settings, you can email a summary report from the site register as seen below:

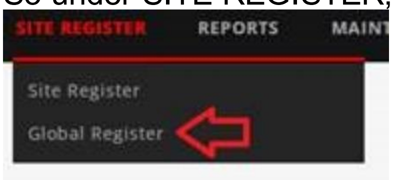


On selection, a screen will show allowing the selection of relevant email addresses, email text and extra emails.

7.9 Global Register

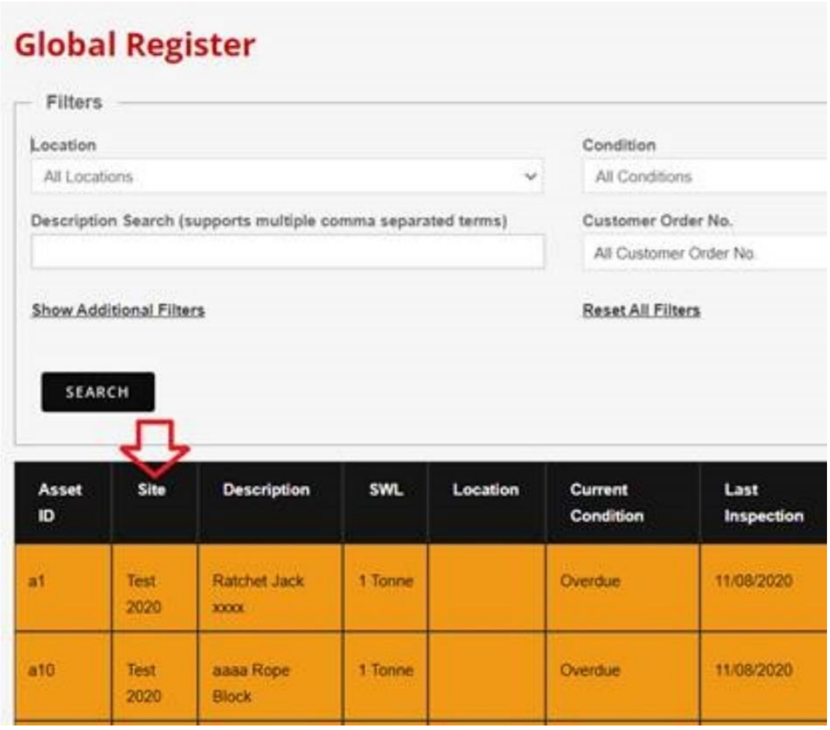
If you have asset details spread over a number of sites, and you want to find a particular asset or location, currently it is a very long-winded process to be able to do this.

So under SITE REGISTER, there is a Global Register option.



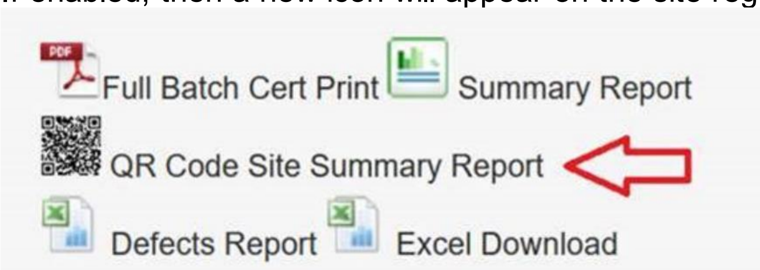
This screen is very similar to the site register screen, except there isn't a site to choose and the functionality is limited.

The site appears in the register table instead for the selection made.



7.10 <u>QR Code Site Summary Report</u>

If you want to know the current contents of your vehicle or kit, having a QR code on the dashboard that will show the current contents and their inspection details in the form of the summary pdf report would be very handy.
If enabled, then a new icon will appear on the site register.



This feature can be enabled on request.

On selecting, it would create a QR code that would be printed.

When the printed QR code is scanned, this will take the user to the pdf page showing the summary report for this site and location as shown.

The QR Code Summary Report generated uses the filters applied on the Site Register by the user to create a summary report the user wants to see.
This functionality requires an internet connection on computer / mobile devices to retrieve the QR Code Summary Report.

7.11 <u>Inspection QR Code</u>

There is as option of a QR code for inspections as well as for locations.
To use this feature, please request for the functionality to be turned on.
The QR icon for selection will be shown next to the pdf icon.

CB06	Chain Block	3 Tonne		No Defects Found	23/03/2026	23/03/2026	23/09/2026		
CB07	Chain Block	3 Tonne		No Defects Found	23/03/2026	23/03/2026	23/09/2026		

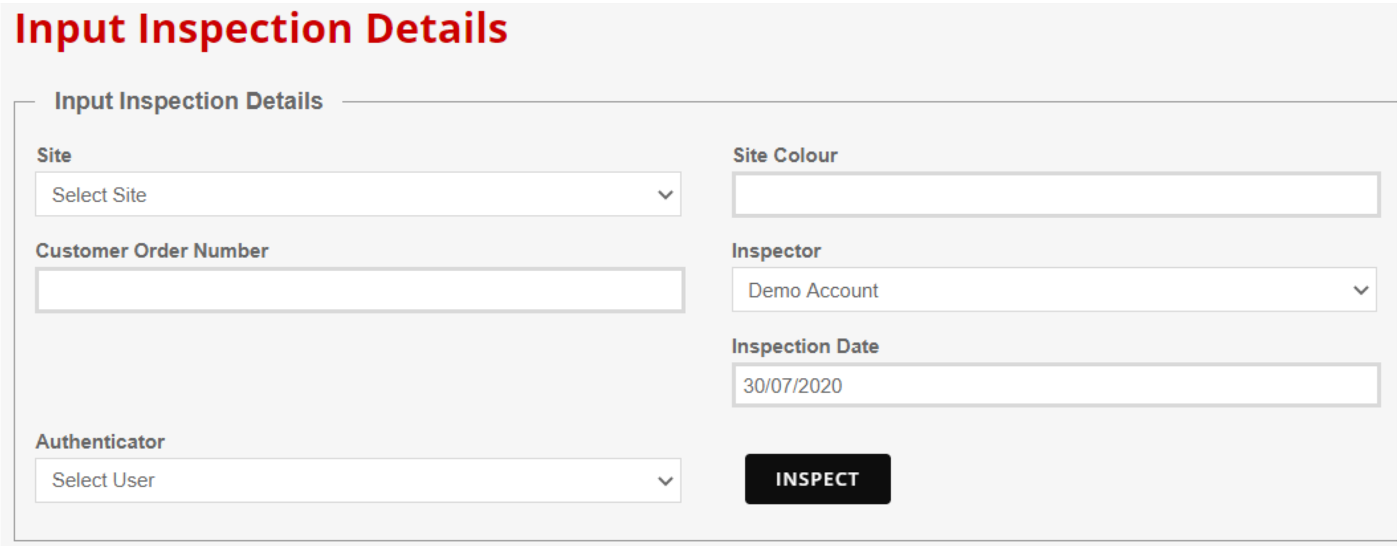
Clicking on the icon will show the QR code that can be scanned to show the certificate on the scanning device.

8 Site Inspection

Inspections are entered through this screen, or through the OnSiteForm app (see section 8). Only authorised users will see this screen.

8.1 Starting the inspection

Inspectors and other users that may have been given access such as hire desk users, are able to log into the web and enter inspection details. From the 'Site Inspection' tab or icon, the inspector selects the site from the list available to the inspector.



If the user is an inspector, they are automatically selected as the inspector. An alternative inspector's name can be selected from the list of inspectors. This is useful when an operator is inputting inspection details on behalf of an inspector.

The inspection date defaults to today's date but can be amended e.g. when inputting historical inspections. The date of input is registered as the 'Report Date' and the entered inspection date is the date of the thorough examination. See points 8f and 11 of LOLER Schedule 1: https://www.legislation.gov.uk/uksi/1998/2307/schedule/1/made

The following points from LOLER Reg 10 Guidance should also be noted:
358 Where the competent person identifies defects which must be made good within a specified timescale, they should submit the report promptly to allow the employer to take the necessary action within the required period.
359 In normal circumstances the competent person should complete the report and forward it ***within 28 days of the thorough examination.***

A default authenticator can be selected in the Settings>Themes section for the company. This can be overwritten for the depot in Settings>Depot>Edit, where depot managers take responsibility for this over the company default. The authenticator can be changed to a user setting. Remember to set up a signature against an authenticator before the inspection as the authenticator's signature is shown on the certificates.

If 'Use Report Number' is selected in the Setting>Themes>Company Details, then 'Job No' can be entered when starting the inspection. This allows inspections to be grouped by Report or Job number.

The site colour and customer order number selected will show up in the default certificate.

When these inspection details have been selected, select the 'INSPECT' button.

8.2 Inspection Summary

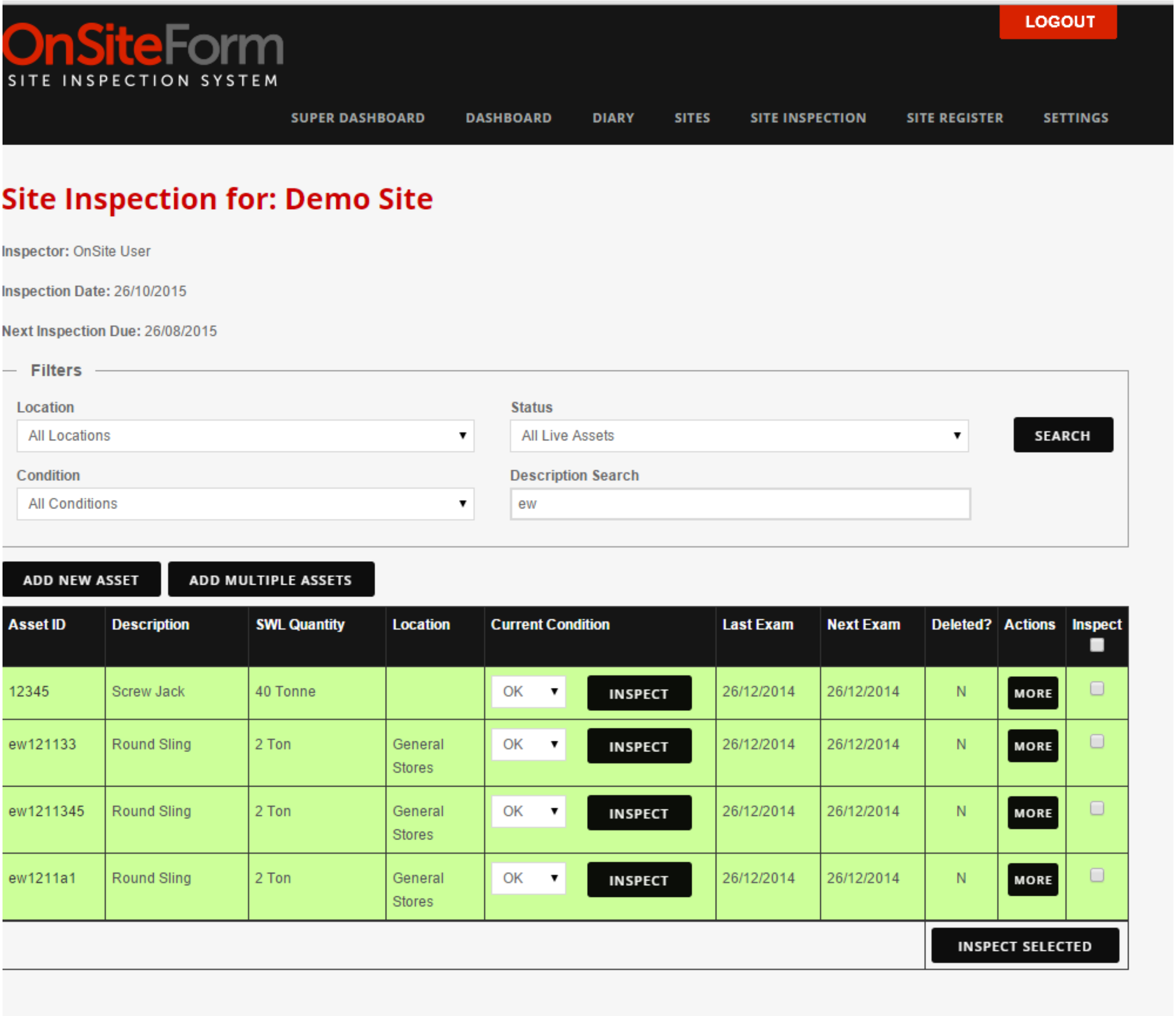
A list of assets that meet the selection criteria will be displayed for inspection. The inspector can filter by asset description, location and asset condition, showing 50 per page for the selected status of:

- All Live Assets
- In-Date Live Assets
- Overdue Live Assets
- Archived Assets
- All Assets.

Each line shows:

- Asset id
- Asset description
- SWL
- Location
- Current condition
- Last inspection date
- Next Inspection date
- Archived (Y set)
- Actions
- An 'Inspect' check box for multiple inspections.

The assets are displayed in numerical/alphabetical order, so the assets that use numbers at the start of their asset ID come first, while ones that use letters at the start come later.



The user can then inspect, add to, edit, archive or permanently delete these assets.
The checkbox on the right-hand side of the screen allows for inspections and deletions to be applied against all of the selected assets.

8.3 Inspecting Assets

If it is a simple inspection, choose the condition and click ‘Inspect’. This will create an inspection record for the current condition, for the date, colour, inspector, authenticator and any other details entered when starting the inspection.

Where more details are needed, click ‘More’ to show more, and enter the Condition, Inspection Type and an Inspection Report before selecting ‘Add Inspection’. The user can also add up to 3 photos to the inspection. Alternatively, the user might be able to fill in Additional Details, such as if it’s the first use after install in the case of new assets or if it is in accordance with a written scheme, before selecting 'Add Inspection'. The most recent Inspection Report is shown beneath the text area to insert a new one.

If the overall 'Inspect' checkbox is selected, all of the items on the page are selected for inspection. Then by clicking on the 'Inspect Selected' box, those assets can be inspected together.

Any flexible inspection fields that have been added will appear on the right-hand side after clicking 'More'. Only one asset at a time can have the more tab open.

Both selections will create an inspection record for the selected condition, date, inspector and authenticator.

8.4 Maintaining Asset Details

Users can click on 'Add New Asset' or 'Add Multiple Assets' to add just one or multiple new assets to the list, or against an asset.

By clicking on the Asset ID, the Asset Details can be amended.

When creating or amending an Asset, the following details are available:

- Location (set up against the selected site)
- Serial Number (ID No).
- Inspection Frequency (Days, Weeks or Months).
- Product Selection plus extra text to add information both before the product and after it, which gets used on the description.
- SWL Quantity, SWL Unit of Measure selection plus extra text to show the SQL description.
- Proof Load Quantity, Proof Load Unit of Measure selection plus extra text to show the Proof Load description.
- Notes.
- Manufacturer Date.
- Manufacturer Asset No.
- Radius.
- Span.
- Quantity.
- Obsolete Date.
- Archived Checkbox (that allows the asset to be archived).

Certain pieces of equipment, in particular PPE, have a lifespan. When that lifespan has passed since the issue date or manufacture date, then the item should no longer be used as it has now become obsolete.
On the site register, on app and web inspections and on certificates. If the PPE is out of service, the asset will be highlighted as obsolete. This happens when the current date exceeds the obsolescence date if set, showing it as Obsolete with the Obsolete colour coding.

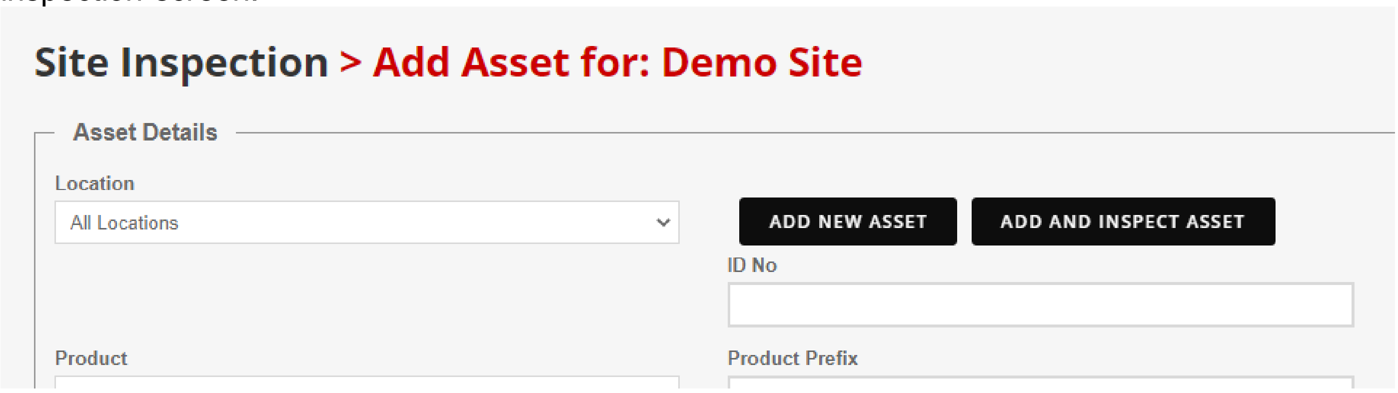
Any flexible asset fields that have been added will appear underneath the details listed above.

If multiple assets are being created, beneath the flexible asset fields is a textbox asking how many new assets you want to be created, with the default being two. After filling in the details, selecting the 'Add Multiple Assets' button takes you to a page where you can fill in the asset numbers of the assets you're creating. All of these assets will use the same details as the ones you filled in earlier, so only use it if you have to create a lot of assets that use the same details.

An asset's current condition changes the colour of its background once it has been inspected, and the colour it changes to is specified in 'Settings > Conditions'.

There are thirty characters allotted for Asset IDs.

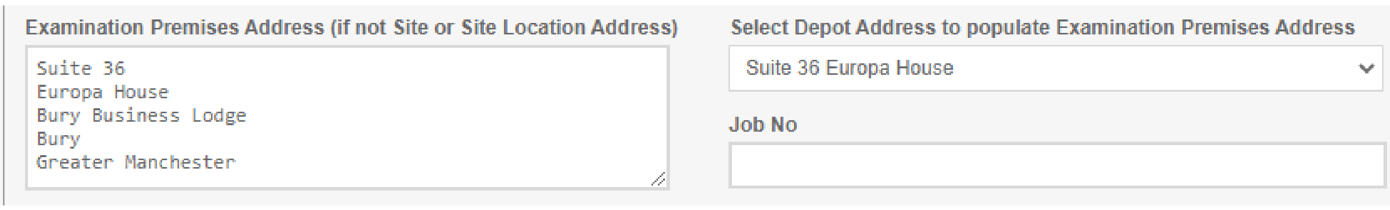
If an Asset has no location listed, then it can only be found by searching with the location search set to "All Locations".
If 'ADD AND INSPECT ASSET' is select, then the asset is added and the user is taken to an inspection screen.



Here the inspection details are added as mentioned in 'Inspecting Assets' above.
The same applies when adding multiple assets, in that selection 'ADD AND INSPECT MULTIPLE ASSETS' will after selecting the assets, will take the user to an inspection screen that will create an inspection record for each of the selected assets.

8.5 Populating Examination Address

When entering the examination address you can use the "Select Depot Address to populate Examination Premises Address" dropdown to quickly filter the Addresses already submitted to your depots. This makes the process much more convenient.

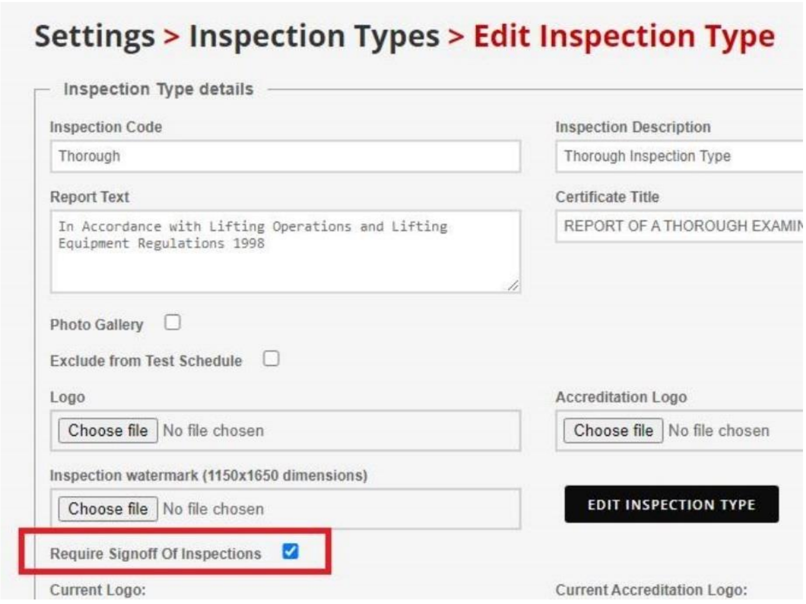


8.6 Inspection Approval process

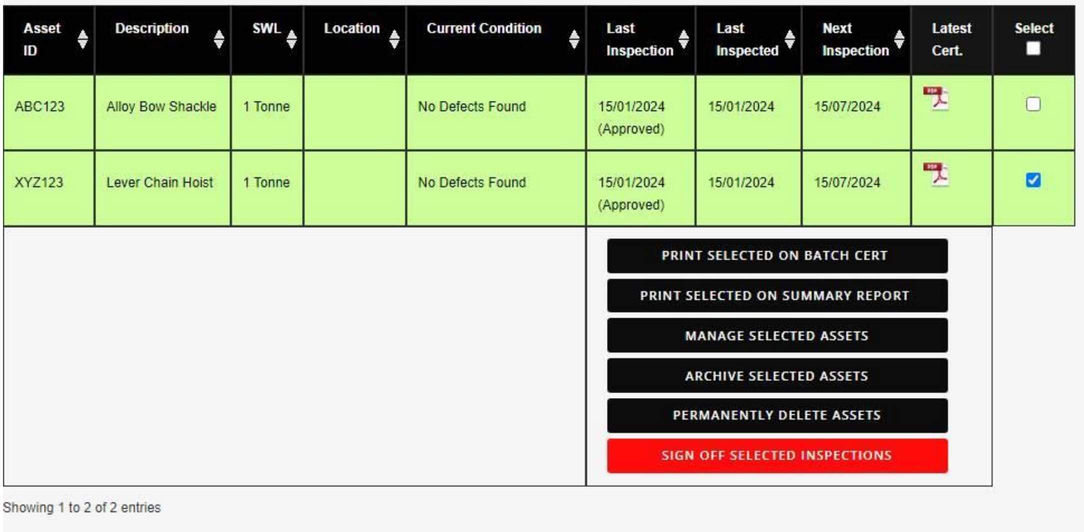
As a customer, you may request an additional inspection process is required on your account.

Once enabled, a new permission becomes available:

Against the Inspection Type, the 'Required Signoff of Inspections' for inspections against that inspection type will need to be enabled:



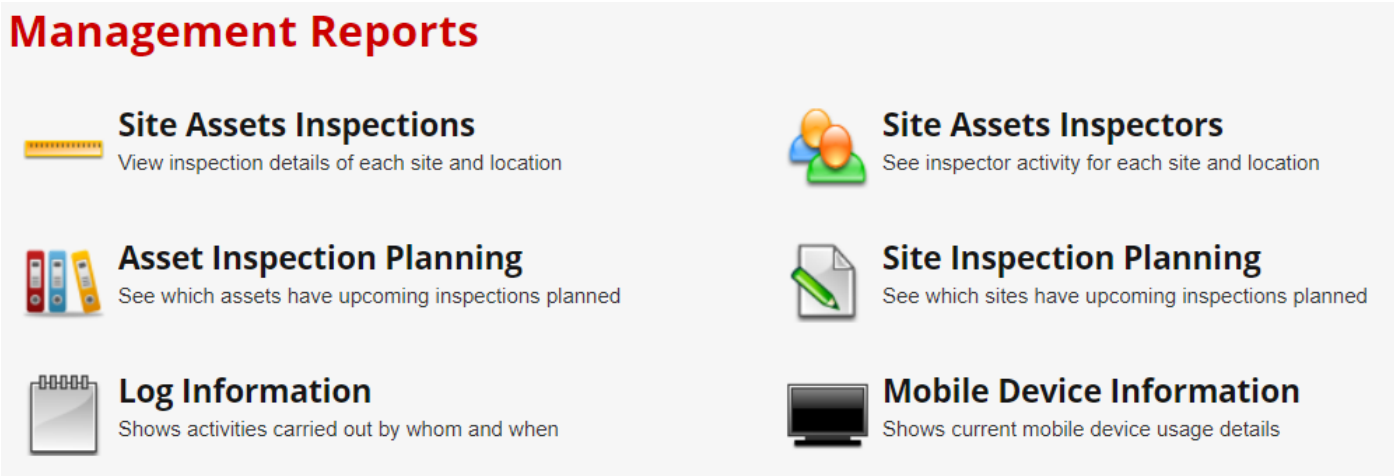
In the Site Register, there is a new option to SIGN OFF SELECTED INSPECTIONS



Once signed off, the Last Inspection will be highlighted (Approved) and the certificate will include the authenticator's name and signature.

9 Reports

Management reports are available to help with usage analysis and monitoring.

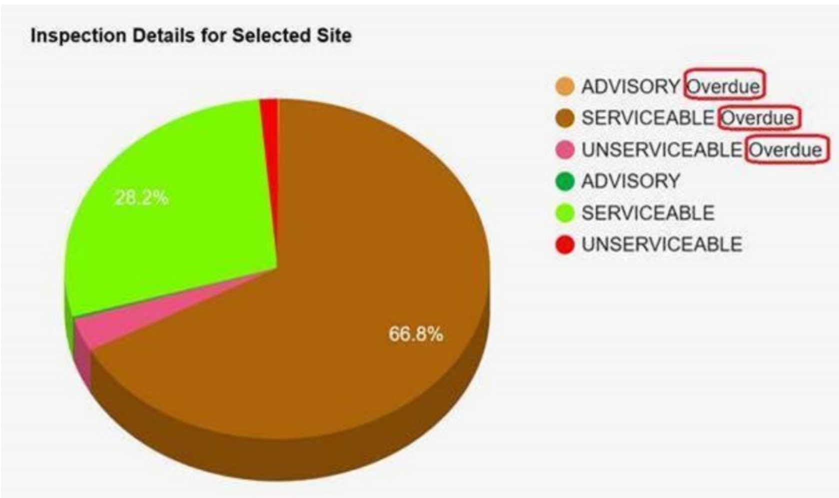


9.1 Site Assets Inspections

This report allows the manager to review inspection details by site and location.
The manager selects a site, or all sites, then selects the ‘SEARCH’ button.

A pie chart is then presented showing the percentage of assets for that site with the latest inspection, that have not been inspected (‘Not Inspected’), and for each of the inspected conditions.

The default is to show the information for all locations. However, by selecting a location and then ‘SEARCH’, a breakdown by location is shown.

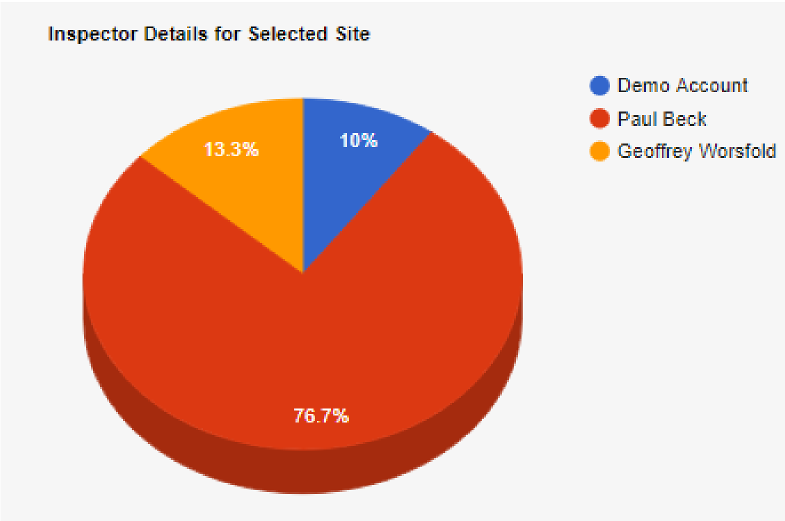


9.2 Site Assets Inspectors

This report allows the manager to review inspector activity by site and location.
The manager selects a site, or all sites, then selects the ‘SEARCH’ button.

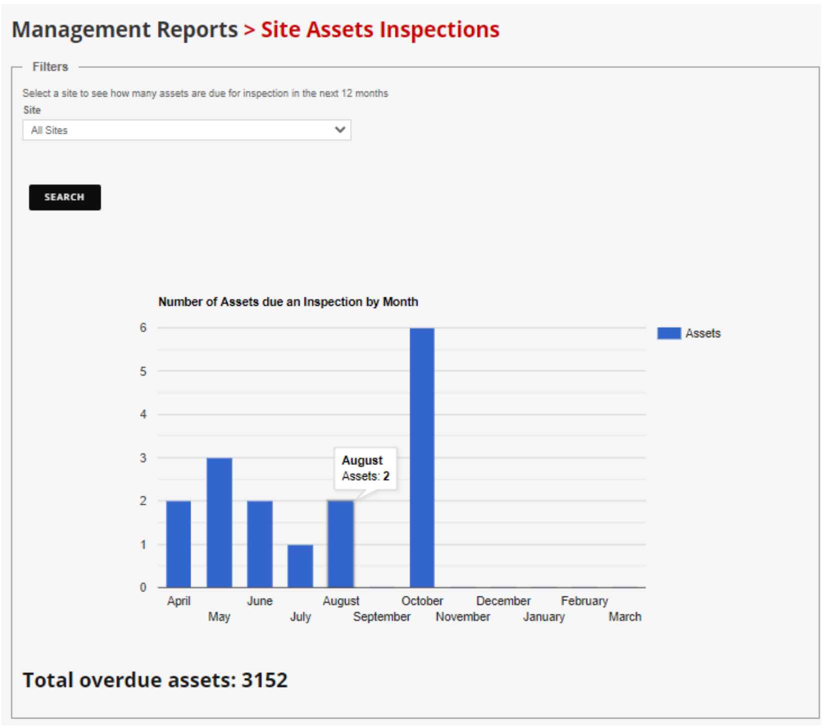
A pie chart is then presented showing the percentage of assets inspected for that site with the latest inspection, for each of the inspectors that have carried out an inspection.

The default is to show the information for all locations. However, by selecting a location and then 'SEARCH', a breakdown by location is shown.



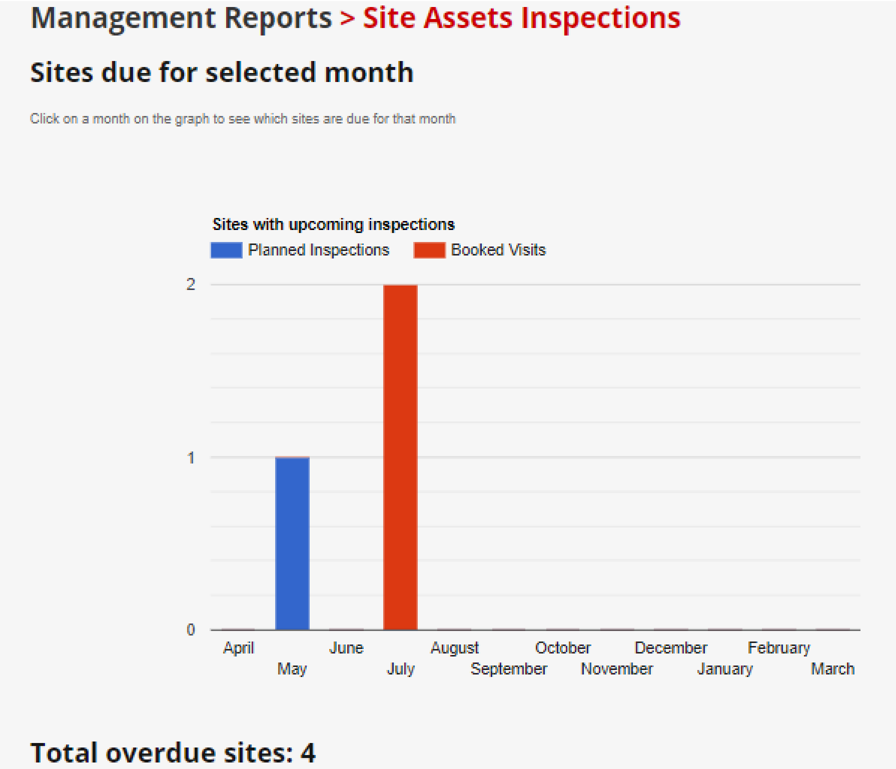
9.3 Asset Inspection Planning

Asset Inspection Planning: Select the site, and it will show a histogram for the assets due for inspection by month. You can filter this by location.



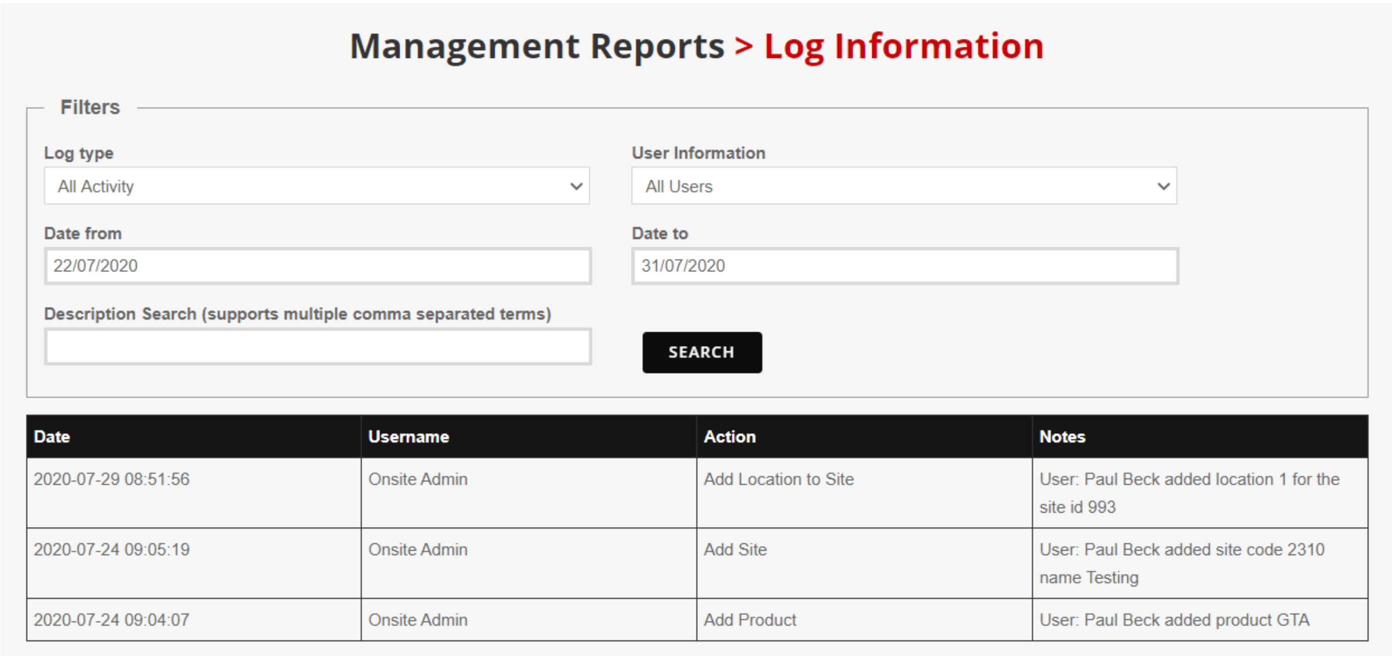
9.4 Site Inspection Planning

Site Inspection Planning: Based upon the inspection criteria set up in the company settings, this histogram will show when the next inspection by site is expected.



9.5 Log Information

Activities performed on the system are logged. Managers can review the Log Information to see what activities have been carried out by who and when.



Management Reports > Log Information

Filters

Log type: All Activity

User Information: All Users

Date from: 22/07/2020

Date to: 31/07/2020

Description Search (supports multiple comma separated terms)

SEARCH

Date	Username	Action	Notes
2020-07-29 08:51:56	Onsite Admin	Add Location to Site	User: Paul Beck added location 1 for the site id 993
2020-07-24 09:05:19	Onsite Admin	Add Site	User: Paul Beck added site code 2310 name Testing
2020-07-24 09:04:07	Onsite Admin	Add Product	User: Paul Beck added product GTA

By changing the filters, the manager can drill down into the log details required.

9.6 Mobile Device Information

This screen shows the current mobile device usage details.

Management Reports > Mobile Device Information

Date of Last Sync	App Version	User Name	Operating System
14/04/2021 10:14	1664	Demo Account	Linux 3.18.91-14843133-QB29764553
14/04/2021 09:01	1664	Demo Account	Linux 4.19.87-20970822
13/04/2021 21:32	1664	Demo Account	iPhone OS 14.4.2 iPad11,3
13/04/2021 15:52	1663	Demo Account	Linux 4.4.88-g0c17a8b8f4a1
13/04/2021 09:27	1662	Demo Account	Linux 3.18.91-14843133-QB29764553
07/04/2021 19:50	1662	Demo Account	iPhone OS 14.3 iPhone11,8

It helps to know who is using the system with the app, when they last used it, what device they are using and which version of the app is installed.

10 Tablet/Smartphone Inspection

10.1 Using the Mobile OnSIteForm App

The OnSiteForm System uses a tablet/smartphone device-based application that enables inspectors to build and run inspections over the Internet through their web browser or using one of the following handheld platforms:

- Apple iOS (iPhones / iPads)
- Most Android (Phones / Tablets)

The handheld device does not need to be connected to the internet during the inspection. It is only needed to sync at the start and the end of the inspection, which can be done at the office. This allows an offline inspection to be carried out without the risk of interruption through the lack of a good connection.

To download the mobile app, go to the iOS App Store or the Android Playstore and install the OnSiteForm app.

The screens displayed will depend on whether you are using a tablet or smartphone.

10.2 Login Screen

Opening the app will take you to the Log In screen that includes the privacy statement.
Log in with your supplied User name and Password which is likely to be the one you use to log into the website.

Logging in for the first time will take you to a Sites screen, listing the sites you have access too. Select the site you would like to inspect. If there are many sites to choose from, you will be able to lookup the site. On selecting the site, you will be taken to a Sync screen, click on Start Sync, which will download the inspection information for that site to the mobile device. Click the back arrow in the top left-hand corner to return to the main menu.

10.3 Main Menu

On the PDA, there will be a login screen, followed by 'Main Menu' screen with:

- Inspect
- Sync
- Manage (if permissions granted)
- Settings
- Logout

And will show the name of the current site loaded.
The way the information is shown depends upon on the screen size e.g. whether it is a smartphone or tablet, and the device's orientation.

The 'Inspect' button is used for inspecting equipment for the logged-in user.

The Sync tab allows an upload of completed inspection details and download of the selected site details. Users will be taken straight to the sync tab upon logging in, so they can make sure their current asset list is correct for where they are. If they already have the correct list, they can just leave, but if they don't, they can select the location they need and press sync. This will erase their current list and provide them with the one required.

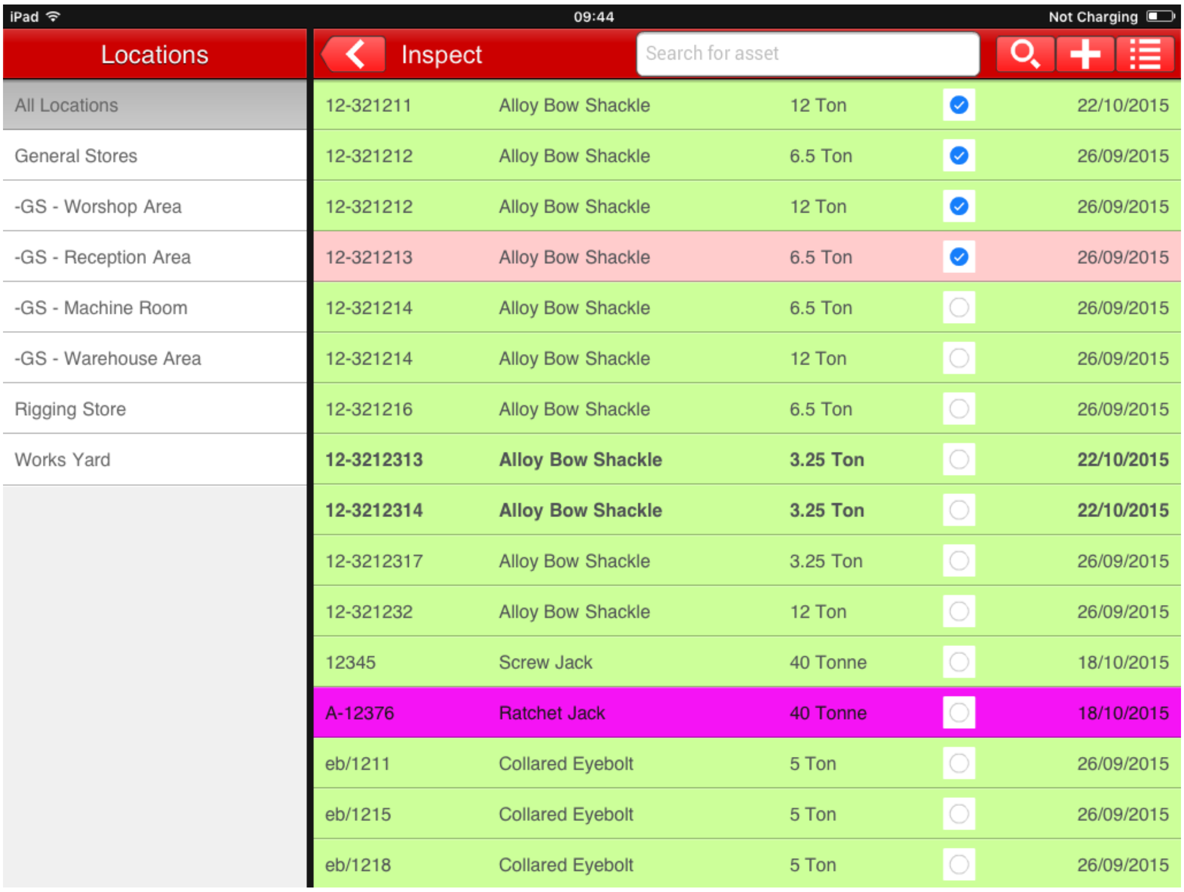
10.4 Inspect Option

The 'Inspect' option takes the user to a 'Site Inspection' screen that allows the user to show assets for 'All Locations' or for a specific location.

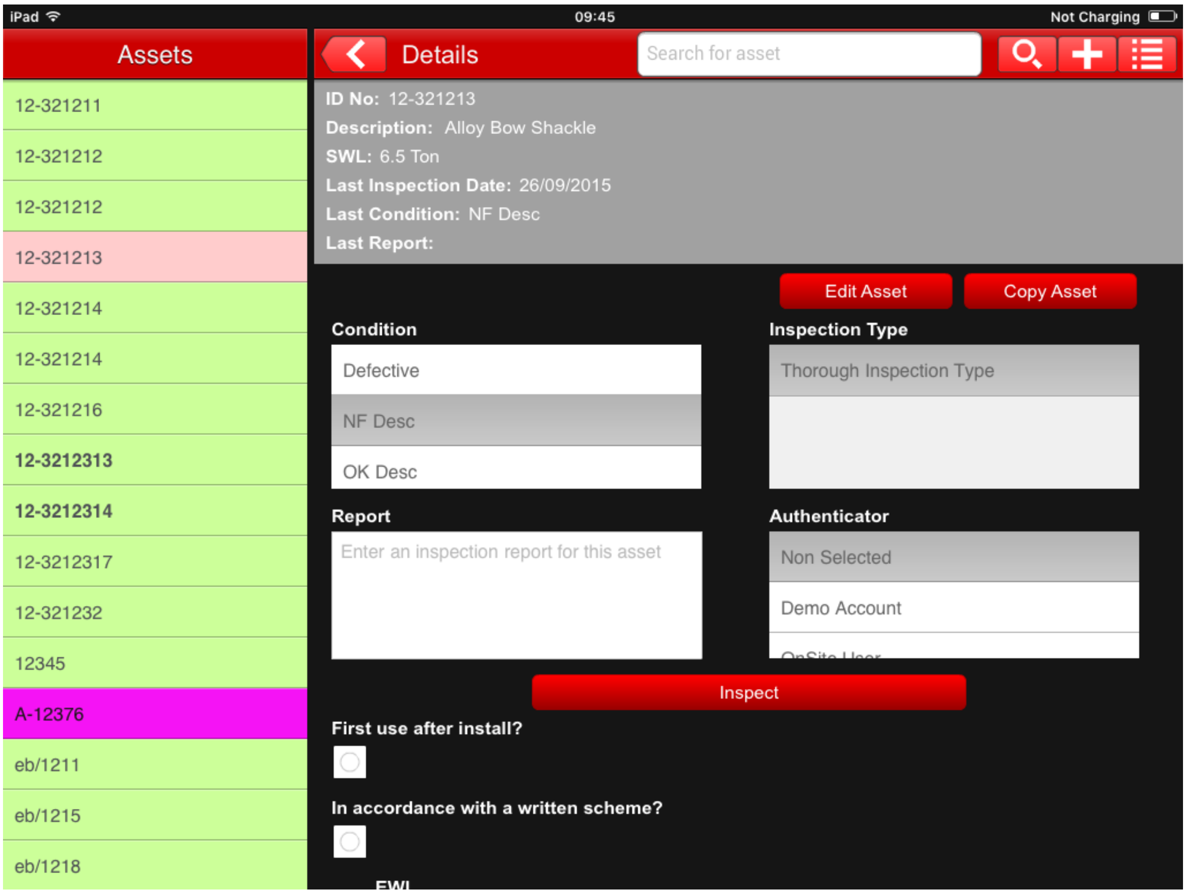
The live assets for that location are shown with their serial number, description, SWL and last inspection date (tablet mode only).

Any assets that have been inspected since the last sync will be highlighted in bold.

Assets are colour coded depending on their condition after an inspection like the browser version.



The items for inspection can be selected individually, or if the menu (hamburger) icon and 'Inspect Assets' option is chosen, multiple asset inspections can be carried out at the same time.



Select an asset and the details shown will depend on what flexible asset and inspection details are required, but typically:

- Serial Number
- Description
- SWL
- Last Inspection Date
- Last reported condition
- Last report
- Any flexible inspection fields.

A number of options are now available.

10.4.1 Add Assets Option

The icon for this is the white plus sign on the red bar. If the 'Add Assets' icon option is selected, then a set of screens is completed to complete the addition. This add assets icon option is also available on the earlier menu screen.

The key details that can be added are:

- Asset id No. - The serial number allocated to the asset.
- Inspection Frequency (months).
- Location.
- Product (from the product selection).
- Product Extra (further product text).

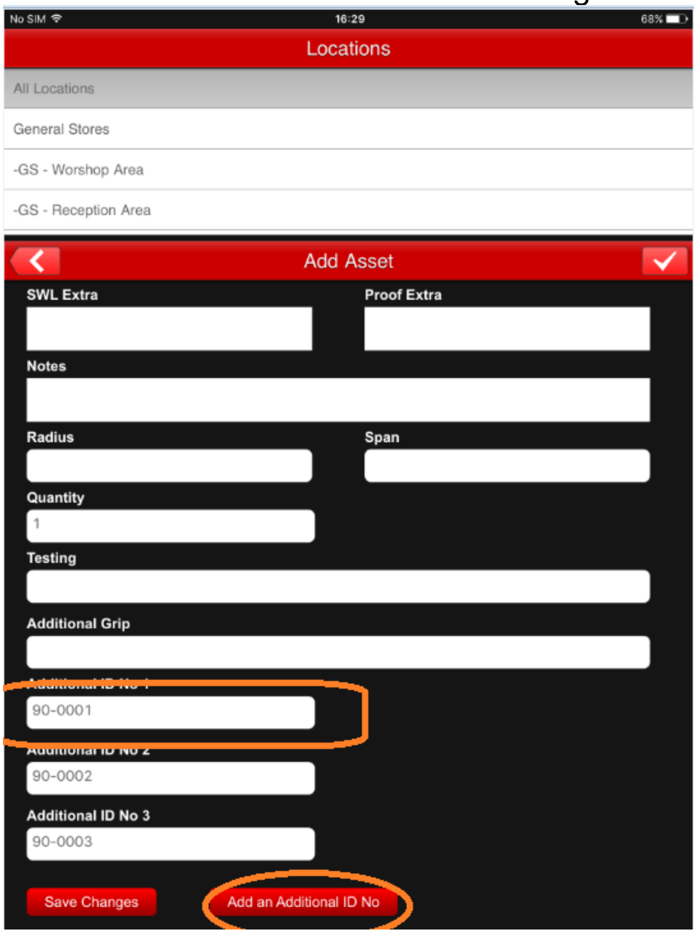
- Manufacturer Asset No. A secondary number that can be allocated. Often used for the manufacturer's number.
- Manufacturer Date.
- SWL – This consists of a number, followed by a SWL type, pulled from a table, followed by optional extra text. The SWL index and the option text are held on the asset table. On every instance of displaying the SWL text, it will consist of number, the text from the SWL table followed by the extra text.
- Proof Load – as with SWL text.
- Notes – A free format comment box.
- Radius.
- Span.
- Quantity.

Any flexible asset fields that have been added will appear underneath the details listed above.

Save Changes can then be selected. Alternatively, the user can just click on the tick on the red bar next to 'Add Asset', as this also serves as a save details button.

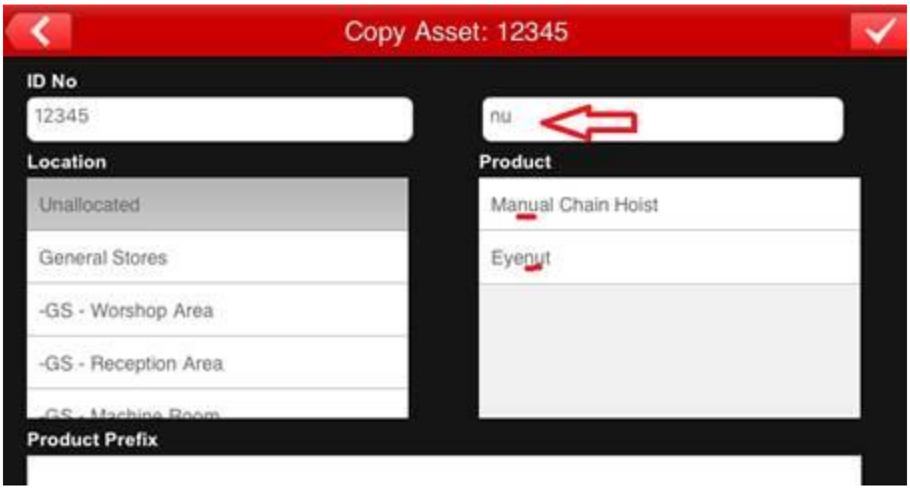
Additional Id numbers with the same details can be added to allow batch addition of asset details.

After entering the first asset Id details, additional assets with the same details can be created by clicking on the 'Add an Additional ID No' button and entering the Additional Id for each additional asset to be added. Click on 'Save Changes'.



When adding, amending or copying an asset, it can be quite hard to find the product if there are a lot of them or if they have not been organised in the expected way.

A search option has been included that searches for the product, even if only a partial selection has been entered.



10.4.2 Edit Assets Option

On selecting the ‘Edit Asset’ button, the existing information for that asset is displayed as per the ‘Add Assets’ option. Here you can also archive an asset.

10.4.3 Copy Assets Option

On selecting the ‘Copy Asset’ button against an ID no, the assets details are displayed. Changes can then be made to the details, and when ‘Save Changes’ is selected, a copy of that asset with the changed details is created.

When an asset is copied, it will have no prior inspection date, and is not inspected, even if it is an exact copy of one that has been. This is because copying simply uses the details of whatever is getting copied to create a new entry exactly alike (apart from the serial number), but inspections are not a part of the details used, hence the lack of prior inspections.

10.4.4 Inspection

The user may select and enter:

- Inspection condition
- Inspection Type
- Inspection report
- Inspection Authenticator

Then select Inspect.

Any flexible inspection fields that have been added will appear underneath the Inspect button. If there are a large number of flexible fields, they are now split into multiple pages.

The screen then goes back to enable the user to select the next asset for inspection.

When in the “Site Inspection” part of the app, there is a button in the top right that looks like four sideways exclamation marks. Clicking on this produces four options: “Filter Assets”, “Inspect Assets”, “Clear Selections” and “Inspect All Assets”.

The “Filter Assets” button takes you to the filter screen, where you can filter the asset list by the number of days since an asset’s last inspection. You can edit this filter further by inputting an asset Id.

The “Inspect Assets” button inspects multiple assets at once. It is blanked out until assets are selected by pressing the red tick box next to the unit of measurement. Once the user has, then they can press the “Inspect Assets” button. This allows them to inspect multiple assets at once. If they accidentally select more assets than they would like, but want to start from scratch rather than unselecting the ones they didn’t want to select manually, then they can press the “Clear Selections” option.

The final option is “Inspect All Assets”. If the user is sure that every asset has all the details that they need and none of them have defects, they can forgo inspecting them all one at a time, or clicking every red tick box and pressing “Inspect Assets” and just press “Inspect All Assets” to inspect every asset shown at once. If in the main filter, the No of days since last inspection is selected, say 30, then it will allow you to inspect all the items not inspected in the last 30 days. So in this case, you might want to set the status of these to Not Found.

10.4.5 Barcode

If the assets are barcodes, the barcode reader can be used.
Place the camera of the mobile device over the barcode and tap on the barcode icon shown below:

This will bring up the camera screen and if the picture is of a good enough resolution, the barcode will be read, the details will show up in the search bar and the asset corresponding to that barcode will be selected. If the asset does not exist, then click on the plus button to add a new asset for that code.

10.4.6 Additional Information

It is possible to move between the different individual assets quickly even after selecting an asset due to the list of assets at the top/side of all the asset pages. This ensures that even if the user selects the wrong asset, they can quickly go to the one they meant to select. This applies even after going into the 'Edit Asset' screen, just in case you didn't notice that you clicked on the wrong asset until then. Clicking on a different one there takes you to the page before the 'Edit Asset' page.

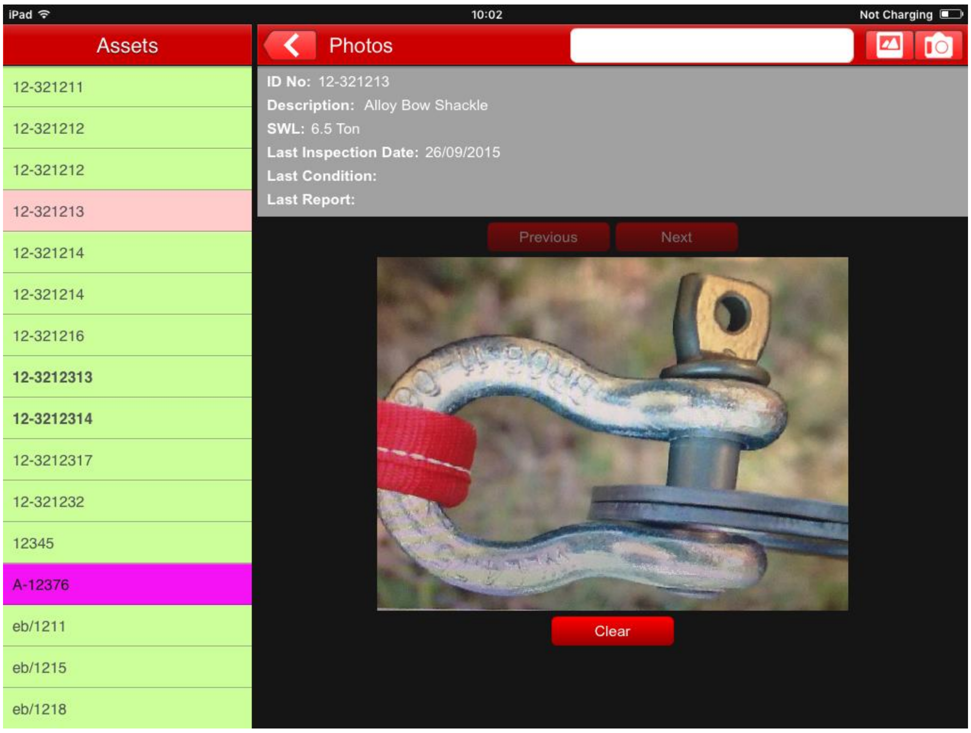
After going deeper into the app, the user may notice a white arrow on the red bar. Pressing this will take you back to the previous page. Not the page they were last on, but the page preceding it in the app. So pressing it on the page "Site Inspection > Asset > Edit Asset" would take you back to the "Asset" regardless of if that is not the page the user was on prior to going to the "Edit Asset" page.

Due to the locations always being available at the top/side of the screen when looking at the asset list, it is incredibly easy to switch between locations.

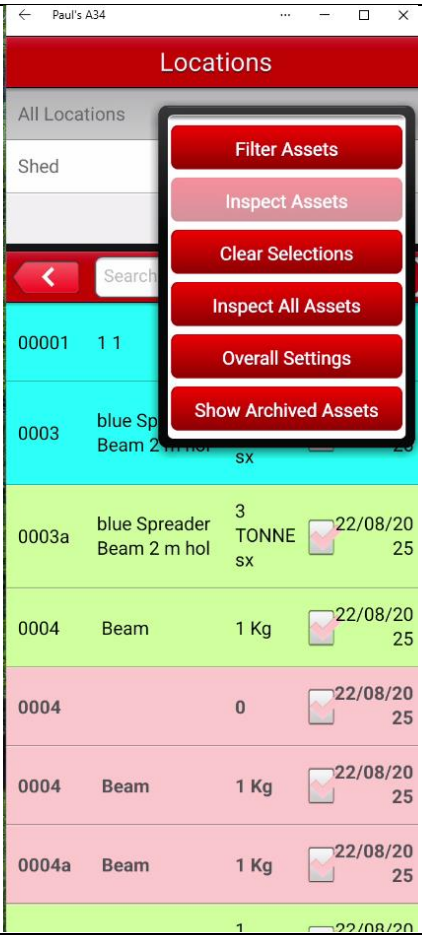
Users can set certain fields of an asset to "Unallocated", which leaves those fields empty. For example, use this feature when the product you are inspecting isn't on the list and you need to write the actual product in the "Product Suffix" field.

The list of assets at the top/side will be the list of what you last searched for. Unlike the browser version, you can edit your search even while looking at an asset.

If the 'Photo' icon is selected, a photo can be taken to go along with the inspection. The photo can be taken there and then, or chosen from the camera roll.



If the hamburger option in the top right corned is selected, then the following options are shown:



Filter Assets: This will enable the user to filter by asset id, asset description, SWL or the number of days since the last inspection. The last option is very useful at the end of inspection to identify those items that have not been inspected in the last 30 days. These can be marked as Not Found for example.

Inspect Asset: Used for inspecting the items checked in the checkboxes as mentioned earlier.

Clear Selections: Clears any checkboxes selected

Overall Settings: This allows the user to select settings to apply to the current inspection.
The colour code updates the site colour code.
The Customer Order Number updates the site Customer Order Number.
The Default Authenticator will apply to the inspection. There is a customer themes setting on the website to make the authenticator to be set on this page.

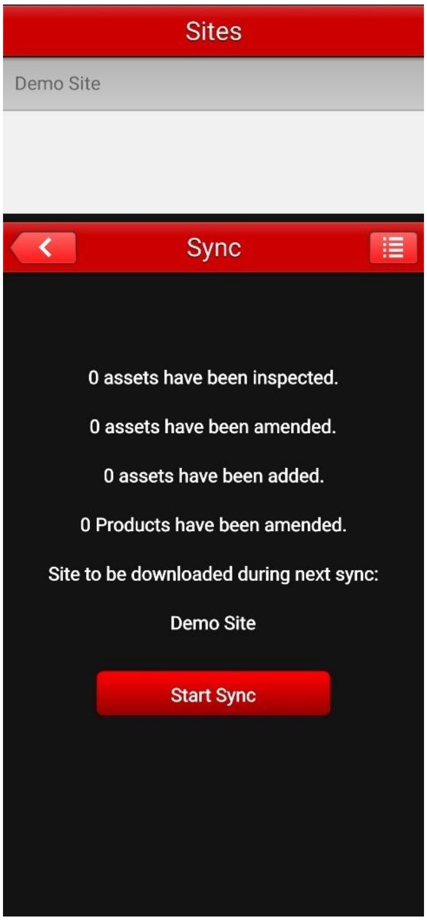
10.5 <u>Sync Option</u>

To retrieve and upload information to the app, a sync is required. This allows the inspection to be carried out without an internet connection.

Only one site is available for inspection at a time.

A summary of how many assets and inspections will be synced is shown.

On the sync screen, select the site for inspection and press the 'Start Sync' button.



The progress of the sync is reported as the sync is being performed.
The hamburger icon in the top right hand corner is used for the Emergency resolution of problems. A password needs to be provided to access this option.

10.6 <u>Manage Option</u>

The 'Manage' option takes you to the Manage screen showing up to 2 options. It will show Manage Locations or Manage Products depending on user logged in permissions.

If the logged on user does not have either permissions, the ‘Manage’ option will not be shown.

10.6.1 Locations Option

Click on the '+' button on the top right hand corner.
You will be able to add the location name, address lines 1 to 3 and a postcode.
You will also be able to identify the parent location.

On the main screen, the top level locations are displayed.
Click on the location and then ‘Edit this location’ button to change the location name.
Click on the location and then ‘Sho Sub-Location’ button to show sublocations for this location.
Use the back arrow to progress back up the location levels.

10.7 Settings Option

The ‘Settings’ option takes the user to a screen where the app can be changed into ‘Tablet’ or ‘Phone’ mode. ‘Auto’ is the default mode for the device you are using which will either tablet or phone layout mode. The new setting may need you to put your device in landscape then portrait mode as well as changing sceen in order for the setting to take effect.

10.8 Logout Option

Selecting ‘Logout’ will log the user from the device and access will only be possible once the user has logged back in again, which requires an internet connection to be available.