

HOW TO PROCESS AND COMPLETE EQUIPMENT INSPECTIONS IN BMA

If an equipment item has the **Service on Return** checkbox checked in the *Equipment Ledger* in Baseplan Enterprise, then an inspection is created by the system before the equipment is returned on a rental contract. Pre-rental inspections can also be created in the system.

Technicians can capture their time, enter hour meter readings, add outstanding items, process checklists, create service jobs and complete inspections in BMA.

Software Version: 2.0

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To process and complete equipment inspections in BMA, the app user must:

- be a Baseplan User configured in the Enterprise system
- have the 'Mechanic' **Role** assigned
- have a **Skill** assigned
- have the 'May Complete Inspections' User/Branch relationship for the relevant branch(es)

PROCESSING AND COMPLETING EQUIPMENT INSPECTIONS IN BMA


Please refer to the 'How to Install BMA on Mobile Devices' guide for information on logging into the application.

Branch will default to the user's branch. The drop down list will display all the branches in the system. Selecting a different branch will list the inspections from that branch.

There are three tabs on the *Activities* screen:

- *My List*: Displays inspections for the current day, allocated to the logged in technician
- *My Overdue*: Inspections allocated to the logged in technician that are overdue and pending completion.
- *Unallocated*: Lists the inspections yet to be allocated in the system. An inspection record can be allocated following either of the methods below

Allocating Inspections

- An inspection is automatically allocated to the technician when they enter one of the following:
 - Hour meter
 - Time taken
 - Checklist response
- An inspection record can be optionally allocated following either of the methods below:
 1. Tap the ALLOCATE radio button for the relevant inspection or
 2. Tap the CHEVRON icon  against the relevant inspection and then select 'Allocate To Me' from the **Allocated To** drop down list

Processing Inspections


1. Tap the inspection to be completed
2. Enter the **Time Taken** to complete the inspection, in hours and minutes
3. Enter the **Hour Meter**


Checklists configured for the Equipment Item, Category, Type or Make/Model will be displayed in the *Checklist* section of the *Inspections* screen.

4. Tap the relevant checklist group accordion
5. Tap the response for the checklist point(s) from the options below:
 - Y – Yes
 - N – No
 - A – Needs Attention
 - NA – Not Applicable

Mandatory points within the group will be denoted by an asterisk (*).

Please refer to the 'Checklist Configuration' guide for information on creating Equipment Inspection checklists in Baseplan Enterprise.

6. Tap the Context Menu  against a checklist point to add notes or capture and attach photos

A PAPERCLIP icon  will be displayed next to the checklist points that have notes or attachments.

A checklist counter on the group accordion will indicate the number of points answered.

7. If outstanding items are to be entered for this inspection, tap the *Outstanding Items* panel
8. Tap the ADD (+) button
9. Enter the outstanding item
10. If the need to create a service job is identified, check the **Create Service Job** checkbox
11. Enter the **Job Description**
12. Select the **Reason** for creating the job
13. Select the **Equipment Category** for the item
14. Tap COMPLETE

Unallocating Inspections

Pending inspections allocated to the logged in user can be unallocated by following the steps below:

1. On the *Activities* screen, tap the relevant inspection record
2. Tap the **Allocated To** drop down list
3. Select 'Unallocate'

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