

# MySite Cheat Sheet

## How do I create a Connection?

Connecting with other Ideagen Plant Assessor users is the first step in supplying machines. Once connected, machines can be supplied straight to site or to pre-qualification where you can pre-approve all documentation to ensure compliance obligations are met.

1. On the Connections page, click 'Add a connection'.
2. Add the First name and Email address of your connection. If they are existing Plant Assessor customers it is important to use the email address associated with their account.
3. Select the connection type that is most appropriate and add in any relevant information such as the machines you are interested in, or any other information that they might need to know before supplying their machine for pre-qualification.
4. Select the Site you'd like them to supply to (leave blank if N/A)
5. Click '**Connect**'.

## How do I know when a Connection has been accepted?

Once your connection request has been accepted, you will receive a confirmation email which details the next steps in the Supply process.

You can see if a connection has been accepted by filtering by status or by the name of the company.



**Orange wheel** = connection is still **pending**.



**Green tick** = connection has been **accepted**.



**Red cross** = connection has been **rejected**.

## Where can I find machines supplied for pre-qualification?

Machines supplied for pre-qual will automatically appear in the Machines for Pre-qualification tab, once a site is selected from the filter menu.

**TIP:** It's also important to check the My Machines tab and filter by '**No sites assigned**' as machines that have been '**supplied to a connection**' only will appear here.

## Reviewing/ approving documents

Setting compliance requirements during your site setup means subcontractors will know what documentation to supply in advance. Once a machine is supplied, you will see a breakdown of documents ready for review and what is outstanding.

**It is important to review and approve or reject all supplied documents to ensure that they are correct and meet your acceptance criteria.**

## Reviewing Risk Assessments

Within the machine's history tab, you can create an assessment review where the assessment questions and answers are displayed as per the time of the inspection.

Reviewing and approving the supplied risk assessment gives greater insight into the context of how the question was answered by the person doing the inspection and informs you of the machine's condition before its arrival on site.

**Important note:** We recommend a formal inspection of the machine is done in person as an extra step of due diligence to ensure the machine doesn't have any undocumented hazards and is fit for use.



## How to approve machines

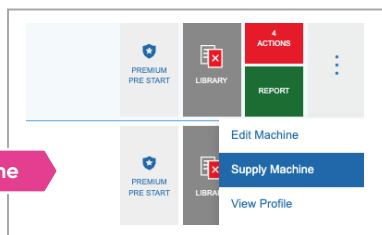
Once you are satisfied with a machine's submitted compliance documentation, you can approve its status for working on site.

1. On the Machines for Pre-qualification tab, click on the ellipsis menu next to the machine and select **'Approve/Reject Machine'**.
2. If applicable, enter the Site Approval Number, and click **'Approve'** and **'Save'**.
3. Once a machine has been approved, **you can move it** onto Site.

## How to supply a machine to Site

Once a machine has been approved in pre-qualification, it is up to you as the Site Owner to move the machine to Site.

Click on the ellipsis menu next to the machine and select **'Supply Machine'**.



The Supply modal will pop-up.

Select **'Supply to Site'** and select the Site from the drop down menu. You will also need to specify the contact for the Machine (this will be auto-populated in the **'Supply Contact'** drop down menu).

A screenshot of the 'Supply Machine' modal form. The title is 'Supply Machine'. There are two radio buttons: 'Supply to a connection' (unselected) and 'Supply to site and/or site pre-qual' (selected). A pink arrow points to the selected option with the text 'Supply to site and/or pre-qual'. Below the radio buttons is a dropdown menu labeled 'Refine site/pre-qual list by connection'. A search bar is present with a 'X CLEAR' button. A pink arrow points to the search bar with the text 'Select a supply contact'. At the bottom, there is a note: '\*Click SAVE to supply machine(s) to the site.'

The machine is now ready to work and operators can begin daily Pre Starts.



## Managing approved machines

Once a machine is supplied to your site, it is important to keep on top of non-conformances.

As a rule of thumb, when viewing a machine on Site, **green = good**, **red = actions required**.

**Some examples of non-conformance:** A required document has expired, daily pre starts are not being completed, an assessment is overdue.

## Outstanding issues

For any outstanding issues, it is important to ask the machine owner to update their machine in Ideagen Plant Assessor as soon as possible or risk their machines being stood down.

**The Machine Owner's contact details** are easily available by hovering over the business card on the Machine's details.

A screenshot of a machine details page. It shows two machine entries. The first is 'Case - 1000D (Dozer, Crawler)' with owner 'PS2.0 Feature Flag Test', asset number 'ID-LOCK', and next assessment '17/10/21'. The second is 'Caterpillar - 12 (Grader)' with owner 'PS2.0 Feature Flag Test', asset number '20210909-21', and next assessment '14/11/22'. A pink arrow labeled 'Hover over the business card' points to a tooltip that appears over the second machine's details. The tooltip contains contact information for 'Plant Equip Co.', including the name 'Rick Brown', phone number '0423 156 156', and email 'rick.brown@plant.com.au'.

If they have any questions on what is required, they can contact our **Support team** for instructions.