



# ASSET MANAGEMENT & ANALYTICS

## Training Guide

The image displays the Safety Evolution Asset Management & Analytics system interface across three devices: a laptop, a smartphone, and a tablet.

**Laptop Screen (Admin View):**

- Repair Log:** A table with columns: Inspection ID, Date, Asset Category, Unit #, Deficiency Area, Repair Status, and Comment Provided.
- Total Repair Cost:** 6.53K (Total Repair Costs).
- Repair Log Table:**

Inspection ID	Date	Asset Category	Unit #	Deficiency Area	Repair Status	Comment Provided
58353	Monday, October 17, 2022	Trucks	2412 White Truck - Lock-Out	Original documents, registration, insurance, journey management plan, drivers licence	closed	Needs cleaning
57633	Wednesday, October 12, 2022	AWP	#21	Hydraulics: check for fluid levels as well as leaks on hoses and cylinders	corrected	Fluid low
40210	Tuesday, October 11, 2022	Truck Hoses	Cat C-15 Unit #001	Rollers/Sprockets/Idler wheels	closed	Rollers need attention
56355	Tuesday, October 11, 2022	Trucks	2412 White Truck - Lock-Out	Seat belts working for all occupants	processing	Belts not working
			#21	Check braking elevate and check drive reduction	processing	Needs attention
			2412 White Truck - Lock-Out	Mirrors rear view and sides	closed	Mirror Cracked
			2412 White Truck - Lock-Out	Seat belts working for all occupants	closed	seat belt broken
			2412 White Truck - Lock-Out	Original documents, registration, insurance, journey management plan, drivers licence	closed	Registration not found
			2412 White Truck - Lock-Out	Warning triangles, back up alarm, beacon	processing	needs a back up alarm
			2412 White Truck - Lock-Out	All workers, managers, visitors or contractors in the shop are wearing required PPE	processing	Jason not wearing safety glasses
			2412 White Truck - Lock-Out	Fire extinguishers - appropriate type, regularly inspected, unobstructed access, signage	processing	tags missing
			2412 White Truck - Lock-Out	Muster station signed	processing	sign post bent

- Repair Log Table:**

id	category	Amount Dollars
20846	Repairs Parts	1100.00
17674	Repairs Parts	600.00
20840	Repairs Labour	500.00
24759	Repairs Parts	500.00
58353	Equipment Purchase	500.00
16122	Repairs Parts	450.00
52626	Repairs Parts	250.00
25287	Repairs Parts	200.00
37358	Repairs Parts	200.00
15733	Repairs Parts	165.00
16303	Repairs Parts	154.00
48560	Equipment	154.00
17530	Labour	150.00
16724	Equipment	126.00
52627	Repairs Parts	120.00
18627	Repairs Parts	100.00
18828	Repairs Parts	100.00
25508	Repairs Parts	100.00
26223	Labour	100.00
<b>Total</b>		<b>6528.25</b>

**Smartphone (Worker View):**

- Click to enter Comment:**
- Tires: check condition, air pressure, rims, stud bolts and nuts**
- ☒ Satisfactory Condition
- ☐ Requires Attention
- ☐ N/A
- Click to enter Comment:**
- All guardrails are sound and in place, including basket chains/gates**
- ☒ Satisfactory Condition
- ☐ Requires Attention
- ☐ N/A
- Click to enter Comment:**
- Fire extinguisher on platform**
- ☐ Satisfactory Condition
- ☒ Requires Attention
- ☐ N/A
- Fire extinguisher missing**
- Manufacture's operations manual is stored on the**
- ☒ Satisfactory Condition
- ☐ Requires Attention
- ☐ N/A
- Click to enter Comment:**

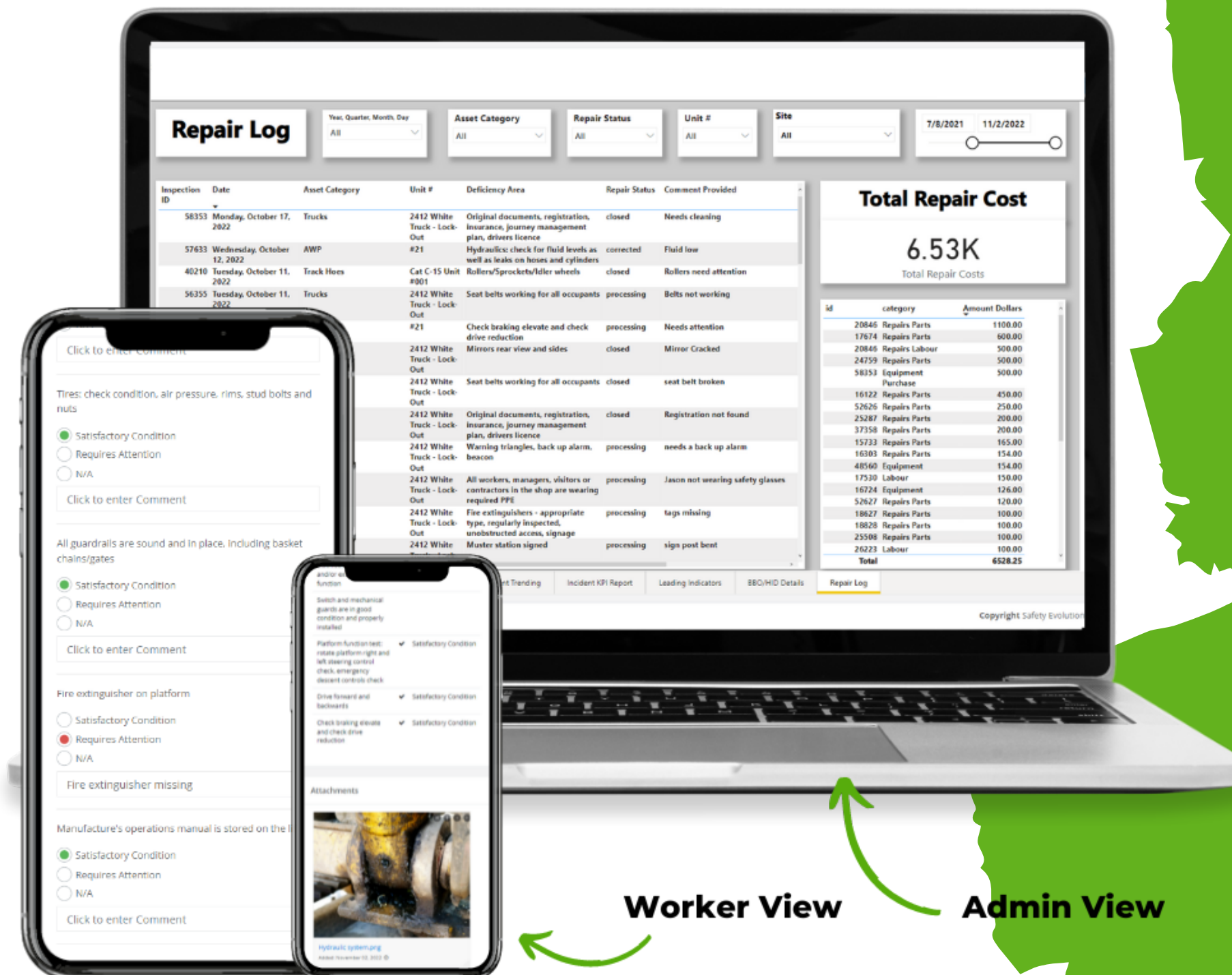
**Tablet (Admin View):**

- Switch and mechanical guards are in good condition and properly installed**
- ☒ Satisfactory Condition
- ☐ Requires Attention
- ☐ N/A
- Platform function test: rotate platform right and left steering control check, emergency descent controls check**
- ☒ Satisfactory Condition
- ☐ Requires Attention
- ☐ N/A
- Drive forward and backwards**
- ☒ Satisfactory Condition
- ☐ Requires Attention
- ☐ N/A
- Check braking elevate and check drive reduction**
- ☒ Satisfactory Condition
- ☐ Requires Attention
- ☐ N/A
- Attachments**
- 
- Hydraulic system**
- Added November 18, 2022 @**



# Reduce Equipment Downtime, With Asset Management

Decrease the chances of surprise repairs by scheduling and tracking your preventative maintenance plan. Workers complete inspections which are connected to action items/work orders and assets.



# Objectives

» By the end of this training guide, you will have an understanding of:

1

## Asset Tracking

Capture all the details on your assets and upload into the system for organization.

2

## Inspections & Scheduler

Access pre-trip and equipment inspections and schedule preventative maintenance

3

## Corrective Actions

Instant action items/work orders/repair logs from deficiencies to prove compliance.

4

## Use Analytics To Track Cost Of Downtime

Data is collected and uploaded into your Microsoft PowerBI Dashboard for analysis

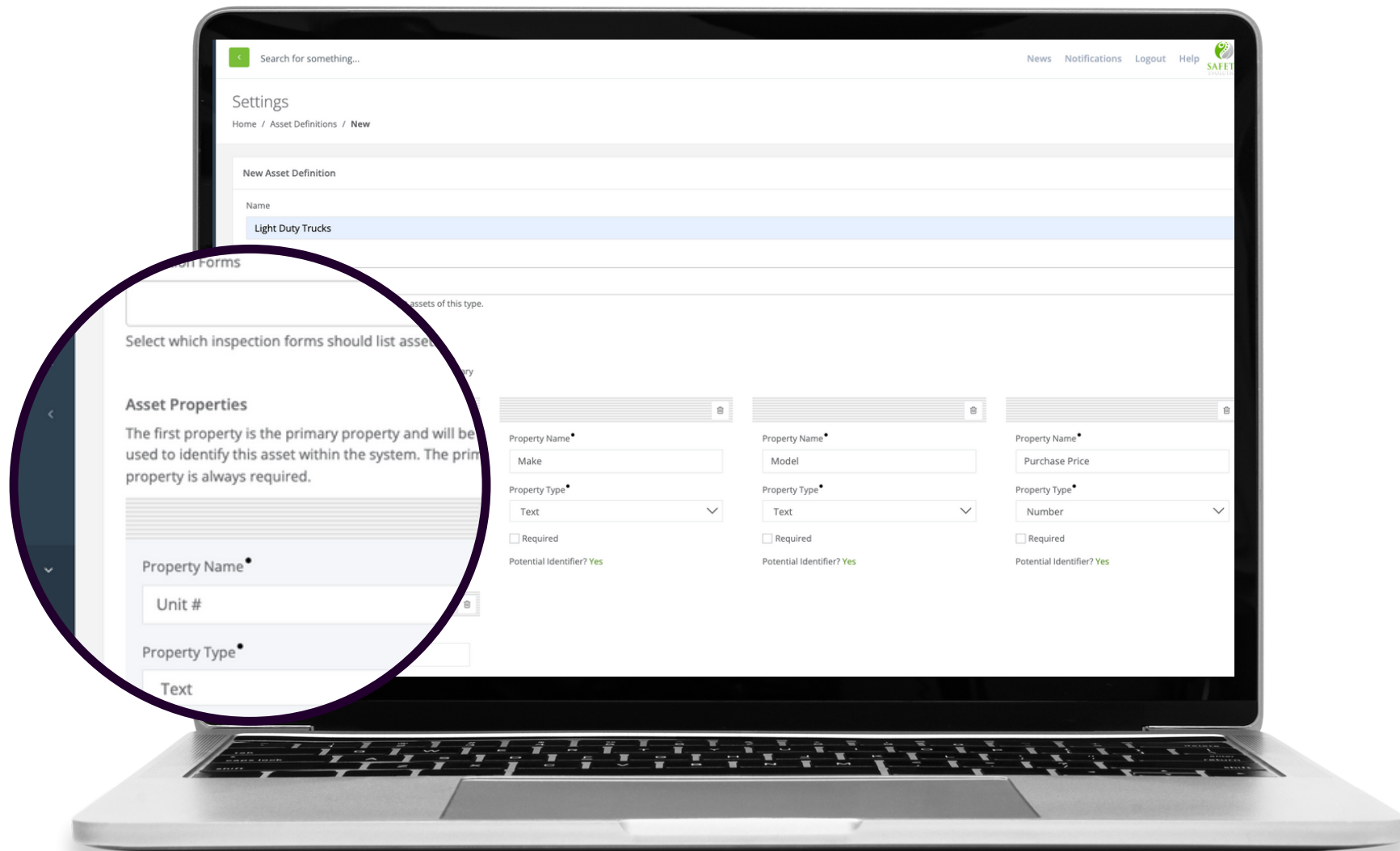


# Asset Tracking

1

Asset  
Tracking

» Capture all the details on your assets and upload into the system for organization.



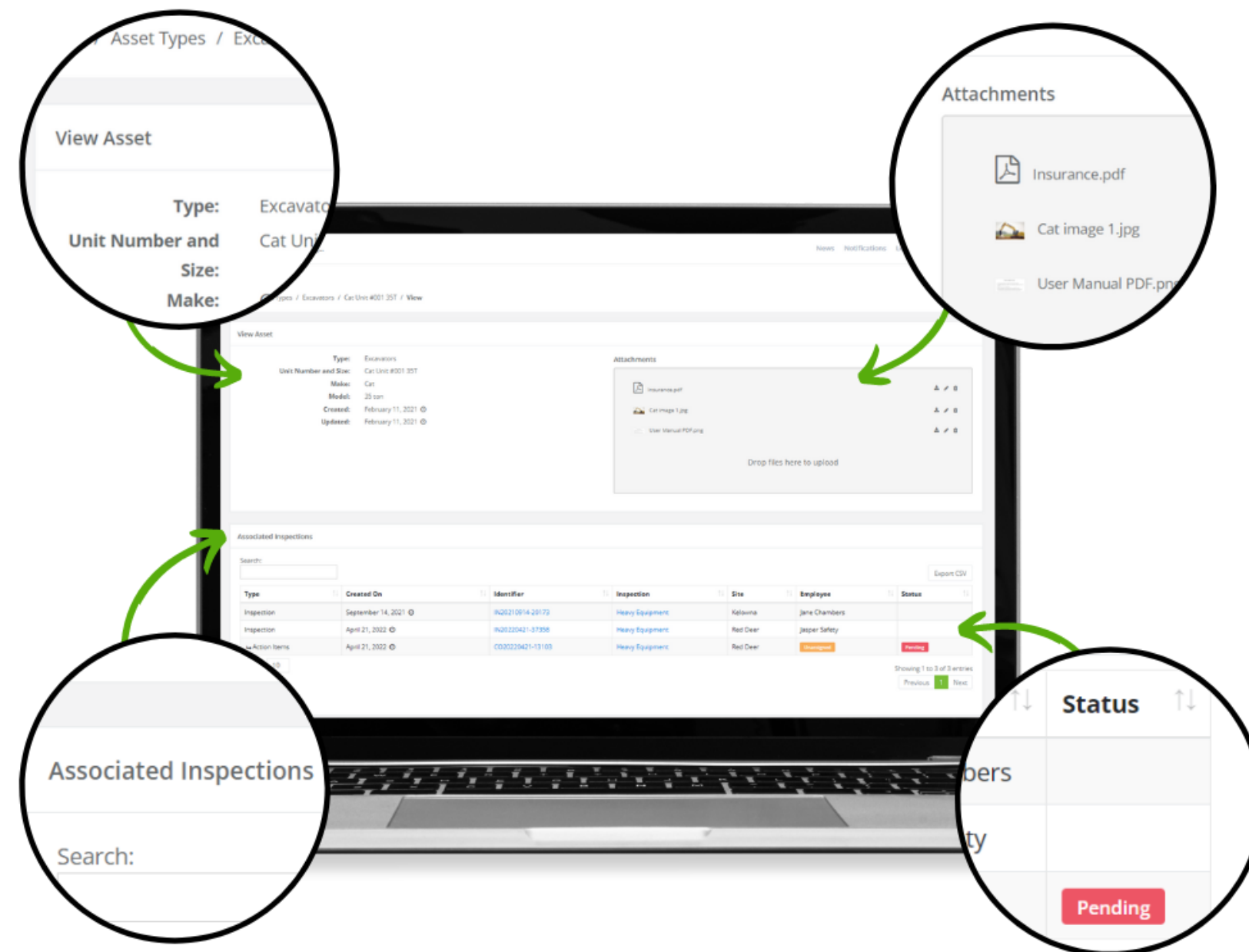
- Upload asset groups/categories into the system, and choose what properties you want to track such as **unit #**, **serial number**, **purchase price**, **make**, **model**, etc.
- Example:
  - Asset Definition Name: Light Duty Trucks
  - First property: Unit #
  - Second Property: Make
  - Third Property: Model
  - Forth Property: Purchase Price
  - Fith Property: VIN
- Properties can be edited and rearranged for ordering at any time.





# Asset Tracking

## » Reference Documents & Searchable Database



- Upload **documents, owner manuals, registration, insurance** details and more.
- **All equipment inspections and repair information link back to the asset** through asset identifiers and work orders. Managers can easily view this information in the field when needed.



# Inspections & Scheduler

2

Inspections & Scheduler

» Access Pre-Trip & Equipment Inspections in real-time to dispatch Mechanics.

Equipment Inspections

Home / Equipment Inspections / Edit

Aerial Platform

Employee

Jane Chambers

Created On

2022-11-02

Site/Location

Main Office

Location

1099 MacDonald Road.

Asset

#21

Hours/Odometer

500

Worker Sign On

Jasper Safety

Third Parties

Click to enter Comment

Tires: check condition, air pressure, rims, stud bolts and nuts

☒ Satisfactory Condition

☐ Requires Attention

☐ N/A

Click to enter Comment

All guardrails are sound and in place, including basket chains/gates

☒ Satisfactory Condition

☐ Requires Attention

☐ N/A

Click to enter Comment

Fire extinguisher on platform

☐ Satisfactory Condition

☒ Requires Attention

☐ N/A

Fire extinguisher missing

Manufacture's operations manual is stored on the lift

☒ Satisfactory Condition

☐ Requires Attention

☐ N/A

Click to enter Comment

Platform function test: rotate platform right and left steering control check, emergency descent controls check

☒ Satisfactory Condition

Drive forward and backwards

☒ Satisfactory Condition

Check braking elevate and check drive reduction

☒ Satisfactory Condition

Attachments

Hydraulic system.png

Added: November 02, 2022

- Equipment Inspections are filled out by the worker with **required fields, locations, photos, videos, timestamps, signatures** and more.
- Maintenance technicians and managers can **view the inspections**, get notified immediately of **deficiencies**, schedule repairs and pull reports as needed.



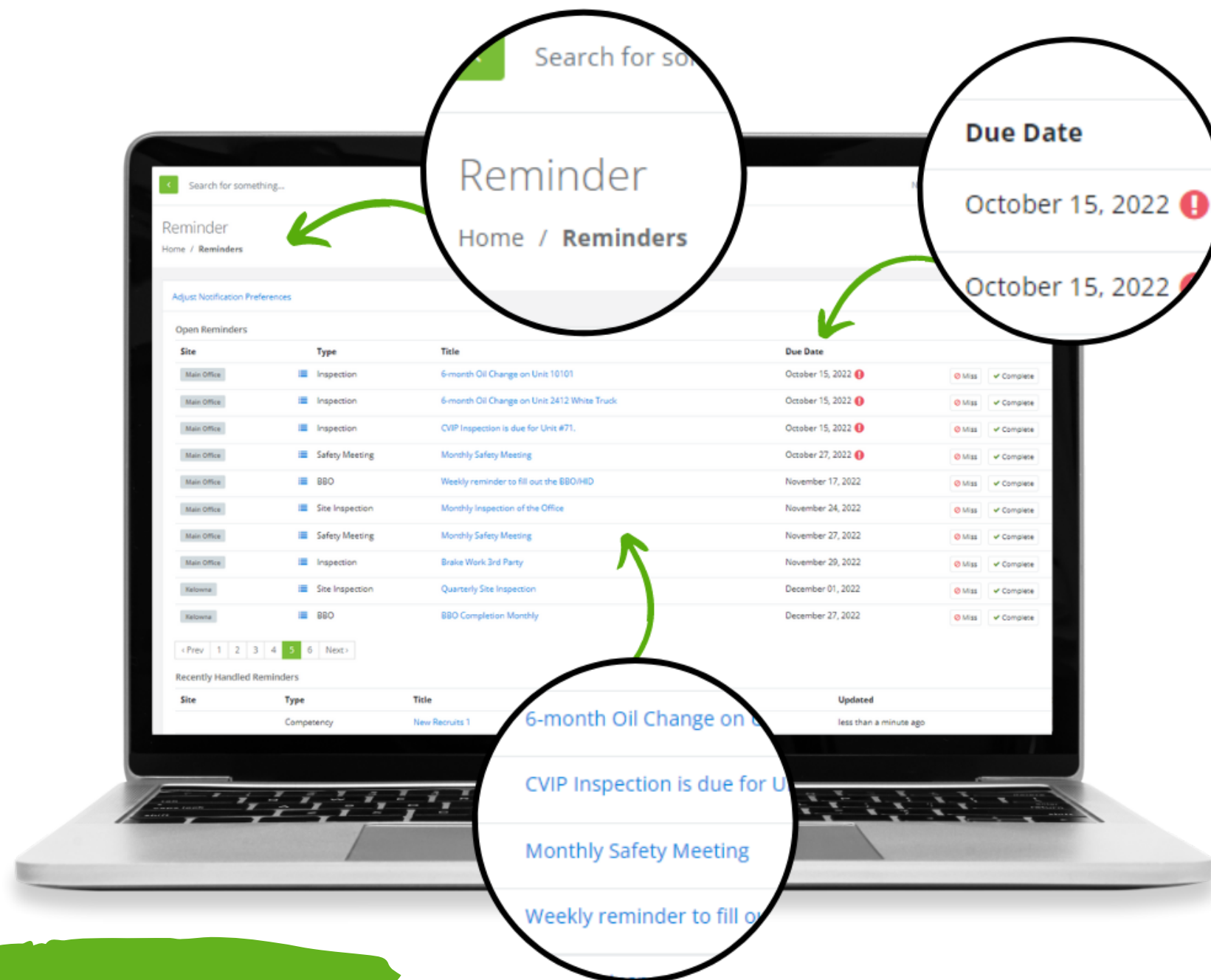
# Inspections & Scheduler

2

Inspections & Scheduler

» Schedule Inspections to reduce unplanned downtime and fines.

- **Schedule** preventative maintenance and third-party **inspections** for all your assets.
- Assign employees, frequency of service, and frequency of reminders. Workers will be alerted with **notifications**.
- Managers can view all reminders and the **state of progress** in the Reminder tool.

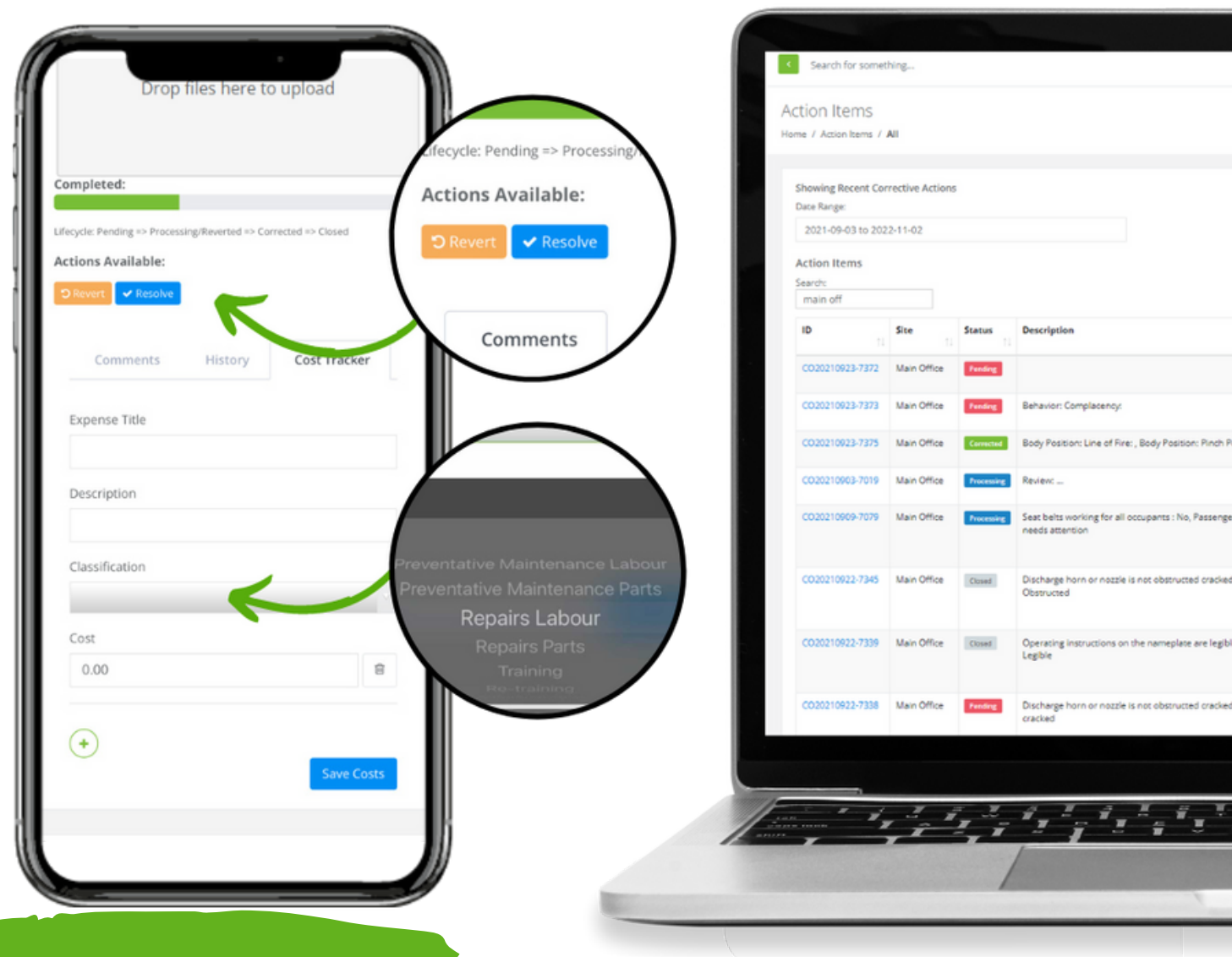


# Corrective Actions

3

Corrective  
Actions

» Instant Work Orders & Repair Logs to prove Compliance.



- As repairs/deficiencies are reported on equipment inspections, the system workflow produces **instant work orders** for your maintenance team.
- Worker orders are easy to review and manage by adding **comments, documents, images, invoices,** and **tracking costs** such as repair parts and more.
- Assign out the Action Item
- Monitor for Progress
- Once a worker completed it, it will come back to you as Completed
- Upon review, Close the Action or Revert for more work to be done.
- **Lifecycle: Pending -> Processing -> Completed-> Closed**





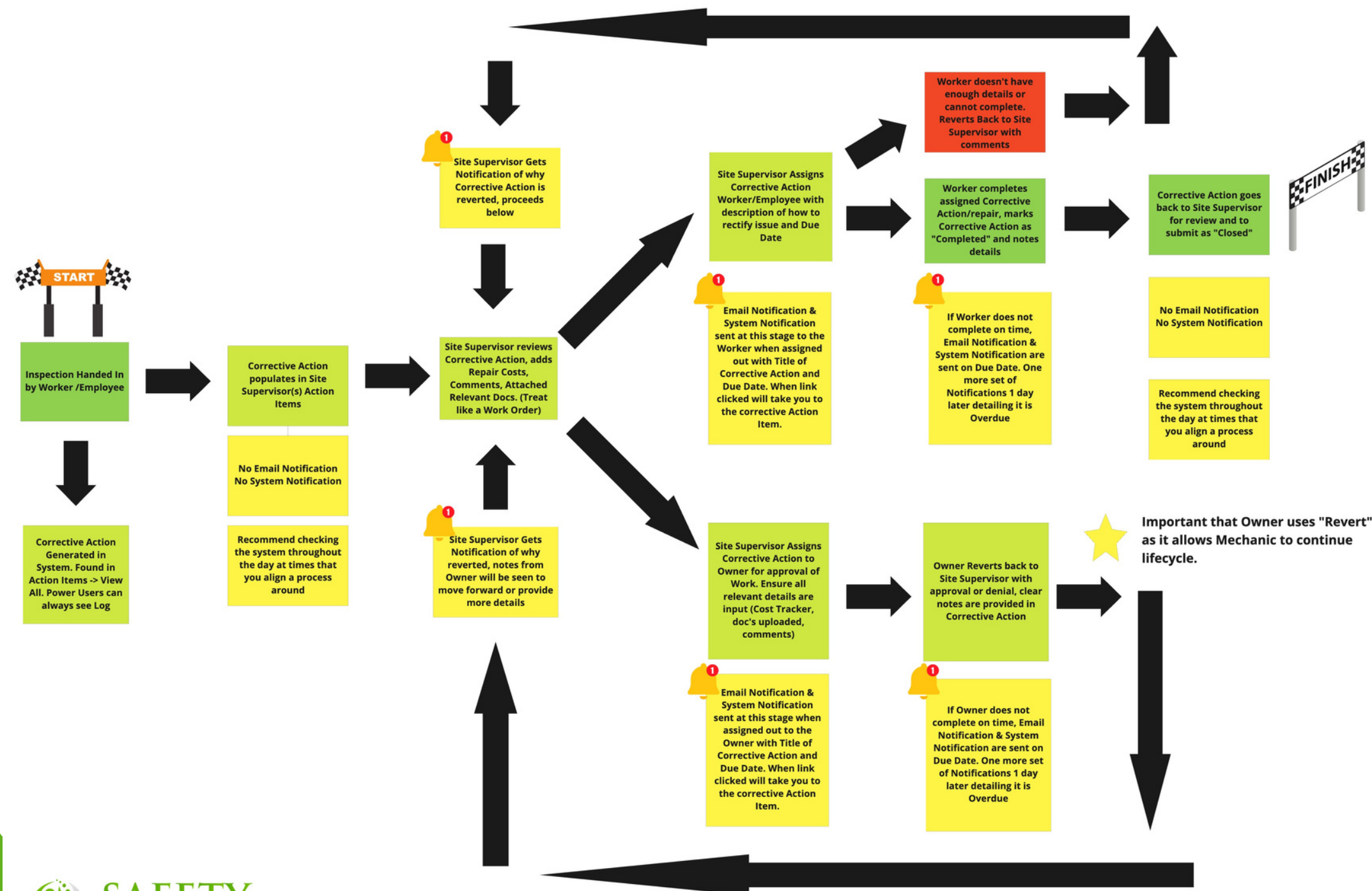
# Corrective Actions



## Corrective Action/Work Order Lifecycle

3

Corrective Actions



# Use Analytics To Track Cost Of Downtime

3

Use Analytics  
To Guide Your  
Safety  
Initiatives

## » Maintenance Reporting Dashboard powered by Microsoft PowerBi

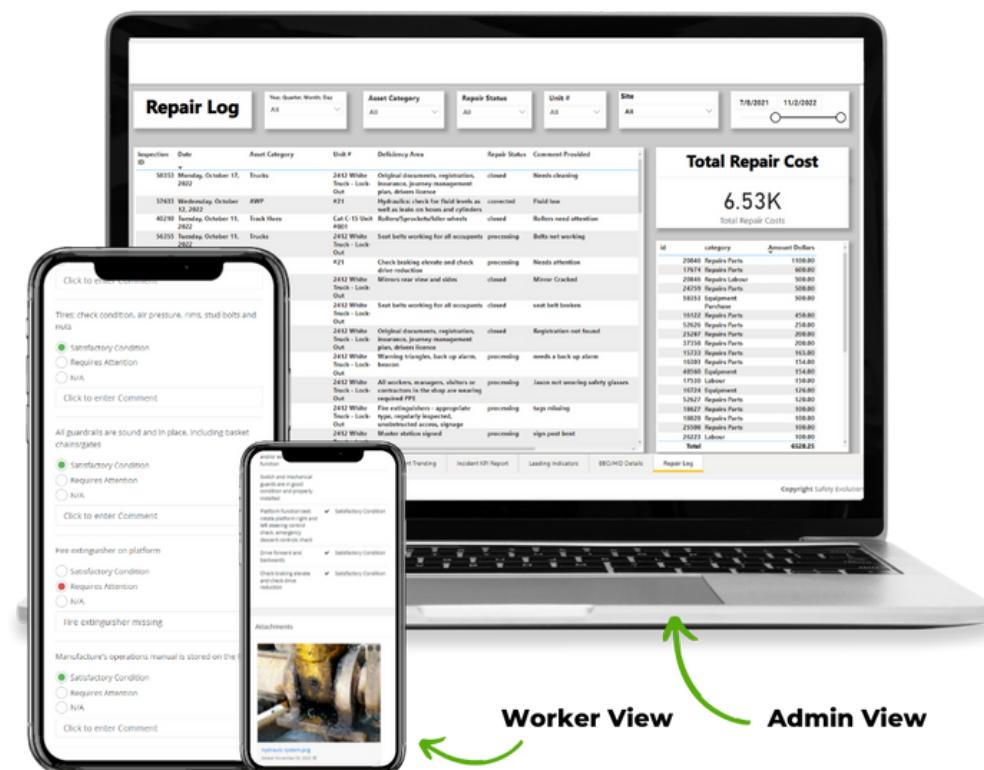


- Your full maintenance history is uploaded into your repair log within Analytics.
- Refreshed overnight for the previous day's data.
- **Filter** by location, asset category, unit, repair status and time.
- View and filter each category of Repair Cost and \$ associated.
- Export an excel report at any time for your own analysis.



# Training Checklist

## » 8 Powerful Features To Assist Your Asset Management



- ☐ Asset Tracking
- ☐ Reference Documents
- ☐ Searchable Database
- ☐ Custom Equipment Inspections
- ☐ Action Items / Work Orders
- ☐ Notifications & Alerts
- ☐ Maintenance Scheduler
- ☐ Repair Log



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**Other questions?**

[support@safetyevolution.com](mailto:support@safetyevolution.com)