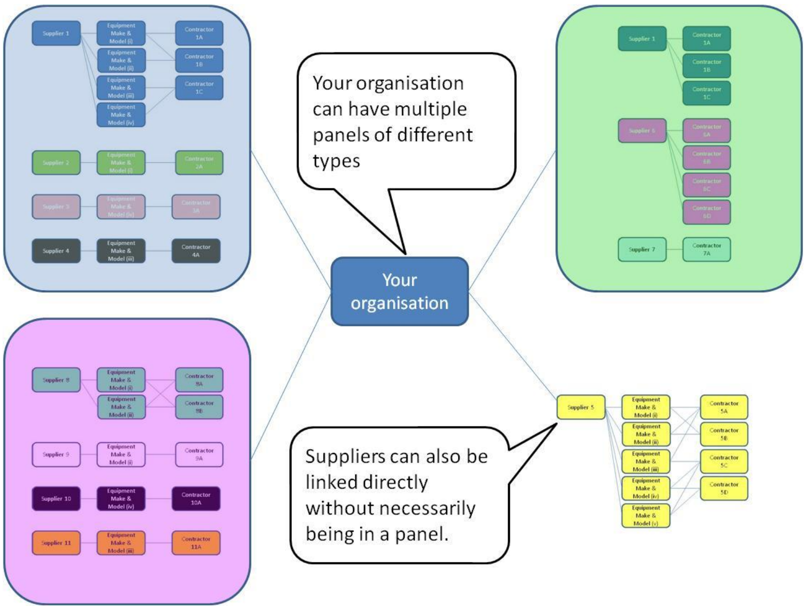
PlantHire Account Setup

Overview

This User Guide will explain how PlantHire™ is put together and the framework upon which it is built.

PlantHire™ development began in 2010 and had three objectives; **STANDARDISE**, **IMPROVE** and **DELIVER** an effective process for engaging external plant contractors.

Effective plant hire administration requires data such as companies, machinery, contractors and contractor competencies and different roles such as Managers, Supervisors and Foremen. PlantHire™ achieves efficiency through automation and reporting to support timely business decisions.



PlantHire™ delivers a framework linking plant hire suppliers, (Companies), their machinery, and operators (contractors), to your organisation.

PlantHire™ records insurance details, compliance details, different assessment levels, individual jobs & their status, Purchase order and time sheet details.

Add to that functional reporting capability and then, you are ready to **STANDARDISE**, **IMPROVE** and **DELIVER** an effective plant hire process for your organisation.

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Building the foundation

For PlantHire™ to work for your organisation: What types of user access are required? How do want PlantHire™ to alert users, remind managers of key events and notify contractors?

Foundation building begins by logging in to https://planthire.apetsoftware.com.au by entering the admin username and password to see:

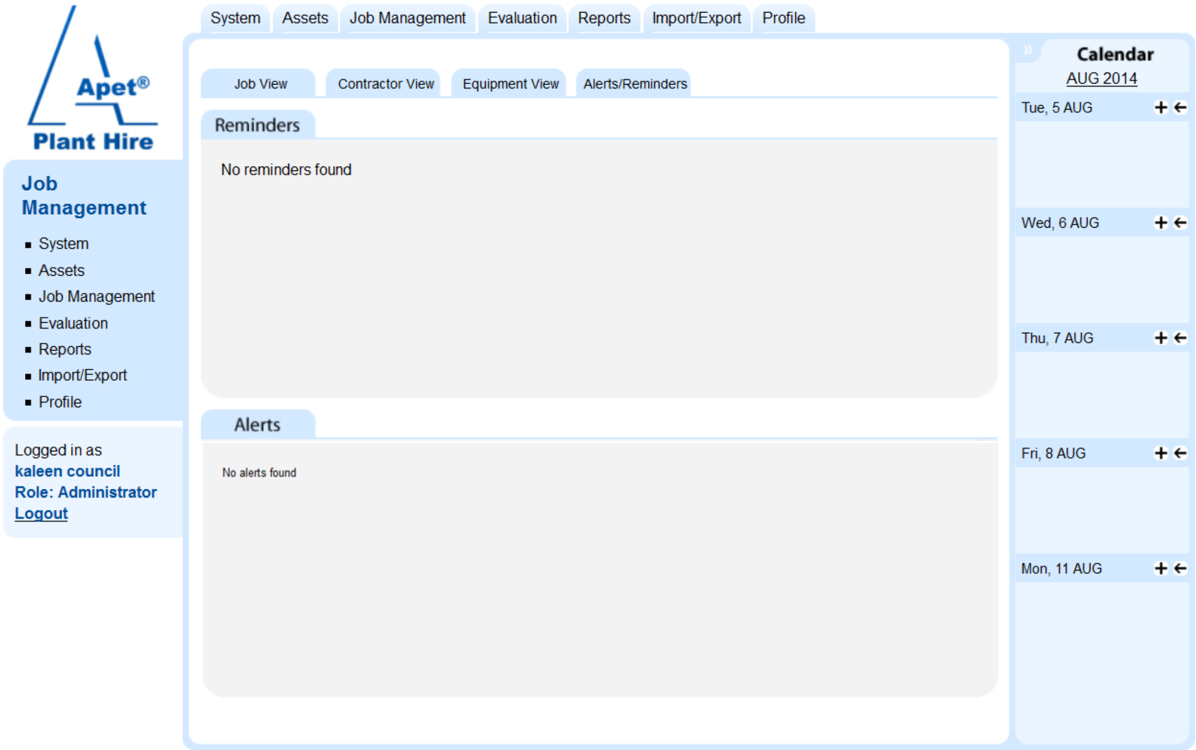

Figure 1 PlantHire Home Screen (Admin)

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User Management

There are four roles within PlantHire™ (Admin, Manager, Supervisor and Foreman) and their functional abilities are illustrated below:

Functions	Admin	Manager	Supervisor	Foreman
Create new users	✓			
Assign user roles	✓			
Create new companies	✓	✓		
Create new contractors	✓	✓		
Add compliance types	✓	✓		
Add hire types	✓	✓		
Add job status description	✓	✓		
Add insurance types	✓	✓		
Add rating definitions	✓	✓		
Add equipment types	✓	✓		
Add make & model	✓	✓		
Add assessment types	✓	✓		
Add assessment classes	✓	✓		
Add assessment points	✓	✓		
Update System settings	✓			
Manage Companies	✓	✓		
Manage Contractors	✓	✓		
Add Panels	✓	✓	✓	
Manage Panels	✓	✓		
Add equipment accessories	✓	✓	✓	
Manage equipment	✓	✓	✓	
Manage jobs	✓	✓	✓	✓
Manage job line items	✓	✓	✓	✓
Manage purchase orders	✓	✓	✓	
Manage time sheets	✓	✓	✓	✓
Manage compliance	✓	✓	✓	✓
Manage ratings	✓	✓	✓	✓
Manage assessment	✓	✓	✓	✓
Run reports	✓	✓		
Import orders	✓	✓		

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Setting up new users

For each user, the following information is required:

- **User name:** A unique user id. Availability of the user name can be checked;
- **An initial password:** Password must be a minimum of 4 characters and include at least one numeric character. Users can change their own password once they log in;
- **Given name:** the user's first (or preferred) name;
- **Family name:** the user's surname;
- **Phone number:** (Optional) Future updates may include SMS alerts;
- **Fax number:** (Optional);
- **Email:** An email address that PlantHire™ will send automated reminders to; and
- **The role/s that person will occupy:** e.g. Manager, Supervisor and / or Forman

For your initial user set up, a table similar to the following may be useful.

	User 1	User 2	User 3	User 4
User Name	AngeWright	PeterW	SamD	JordanB
Password	Password1	Password1	Password1	Password1
Given name	Ange	Peter	Sam	Jordan
Family name	Wright	Waldron	Denver	Bath
Phone	0400 123 466	0400 123 467	0400 123 468	0400 123 469
Fax	02 6251 4103	02 6251 4103	02 6251 4103	02 6251 4103
Email	aw@plant.com.au	pw@plant.com.au	sd@plant.com.au	jb@plant.com.au
Role	Manager	Manager/Foreman	Forman	Supervisor

Note: You are required to set up a Foreman to be able to create a new Job.

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How to add a new user

Note: Only an Admin User can add new users.

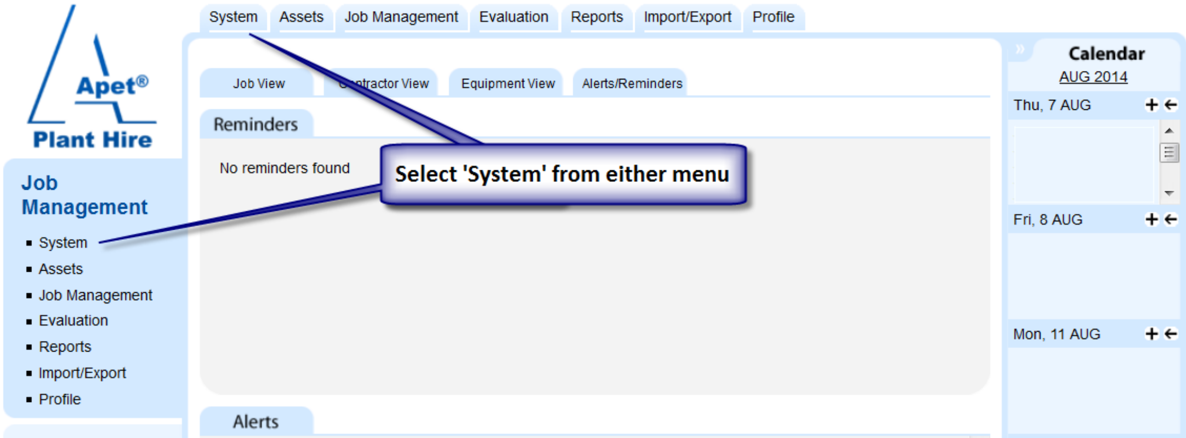

Figure 2 Selecting the System menu

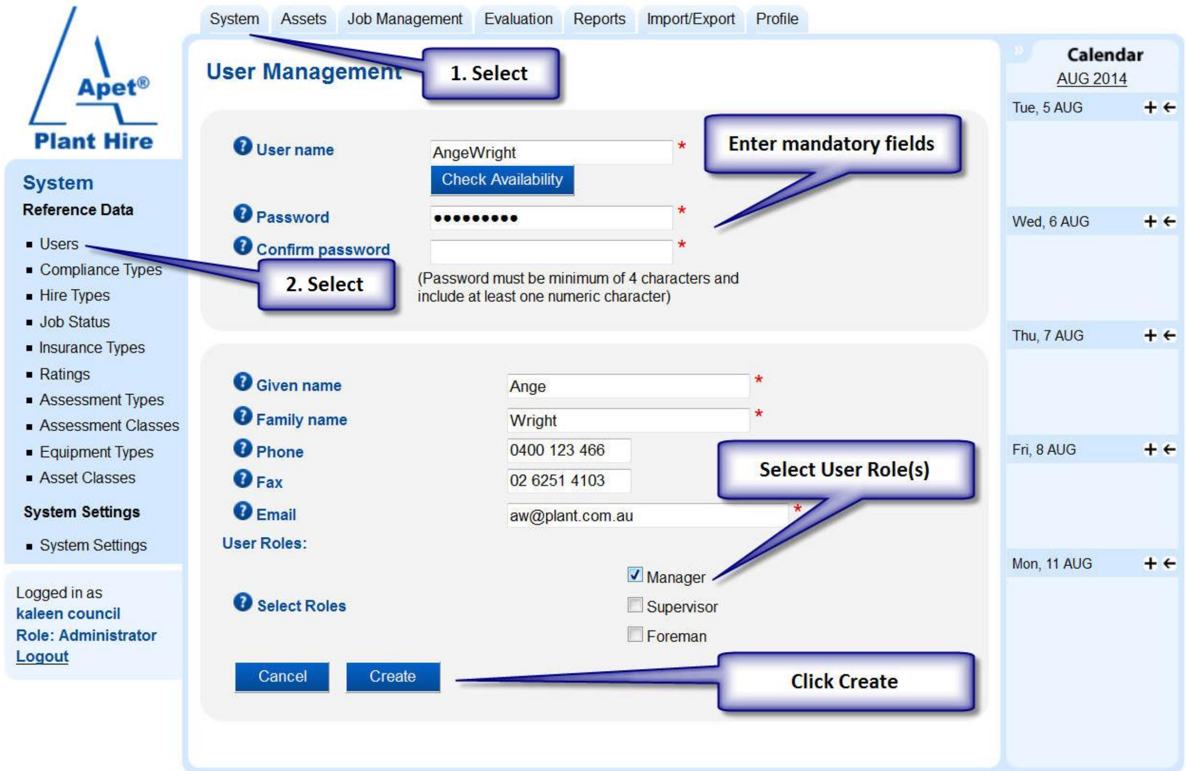

Figure 3 Adding a new User

Repeat this process for each user.

How to delete a user

Note: Only an Admin User can delete users.

Go to System > Users. Select the user you wish to delete and click on the delete button.

How to update a user

Note: Only an Admin User can update users.

Go to System > Users. Select the user you wish to update and click on the update button.

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Assets

How to set up a new Company

A Plant Hire Provider can be recorded in PlantHire™ as a Company, a Contractor and or both; i.e. a contractor can be linked to a company.

Note: Only an Admin User can create new companies.

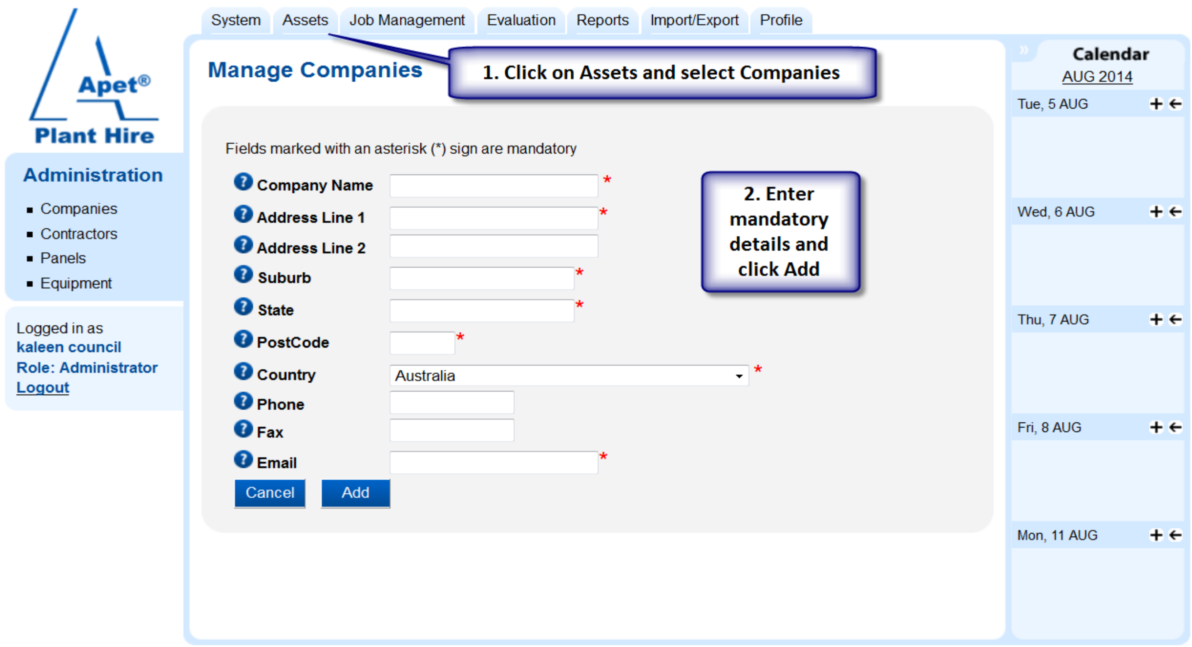

Figure 4 Add a new Company

Repeat for each Company to be added.

To edit and update company details, select the company from the Manage Companies page.

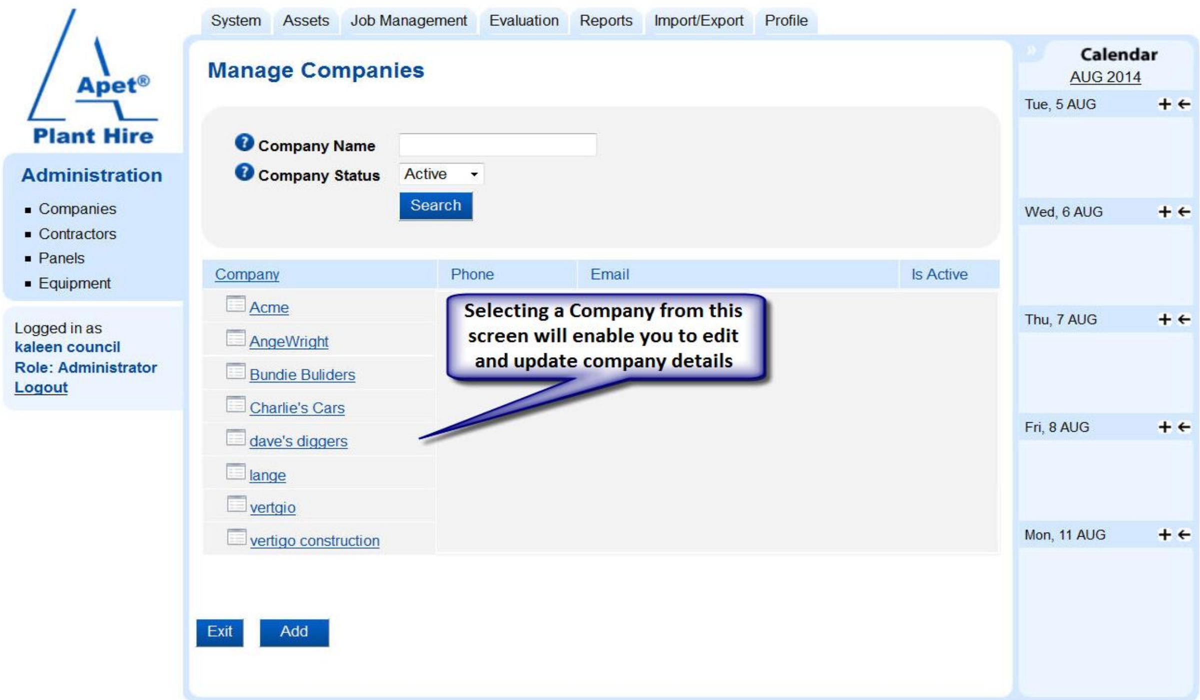

Figure 5 Edit Company details

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How to add new Contractors

Note: Only an Admin User can add new contractors.

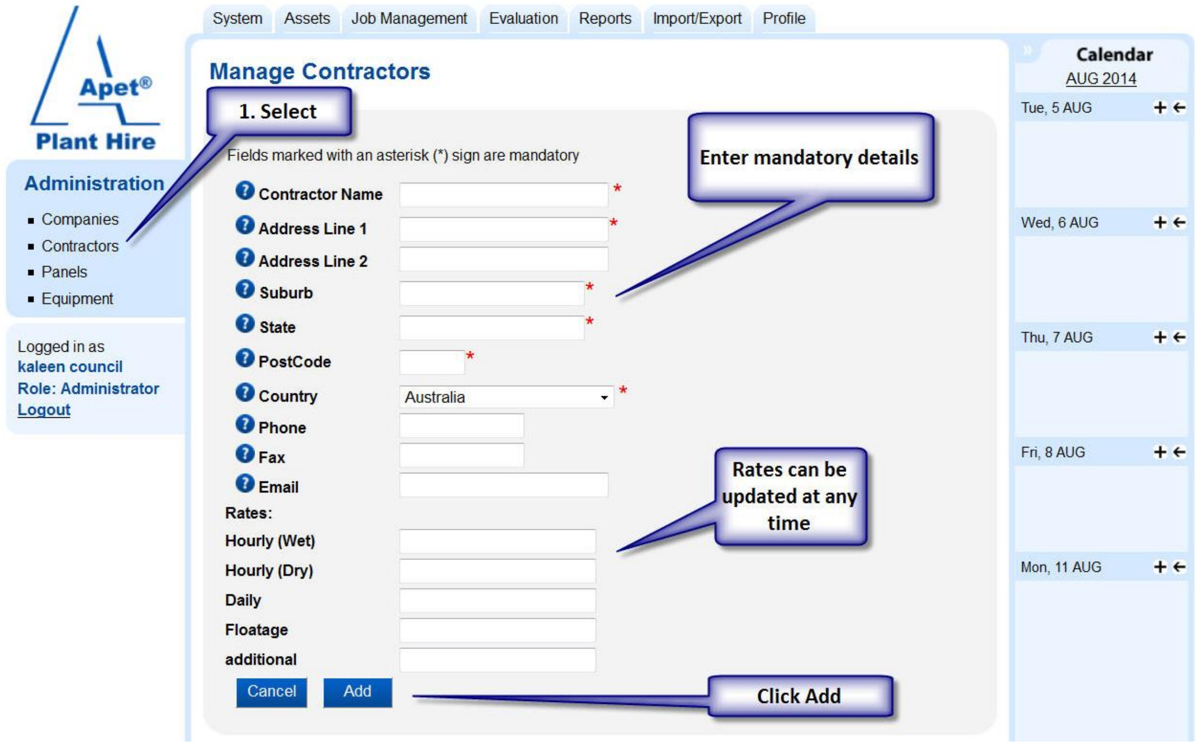

Figure 6 Add a new Contractor

To edit and update contractor details, select the contractor from the Manage Contractors page.

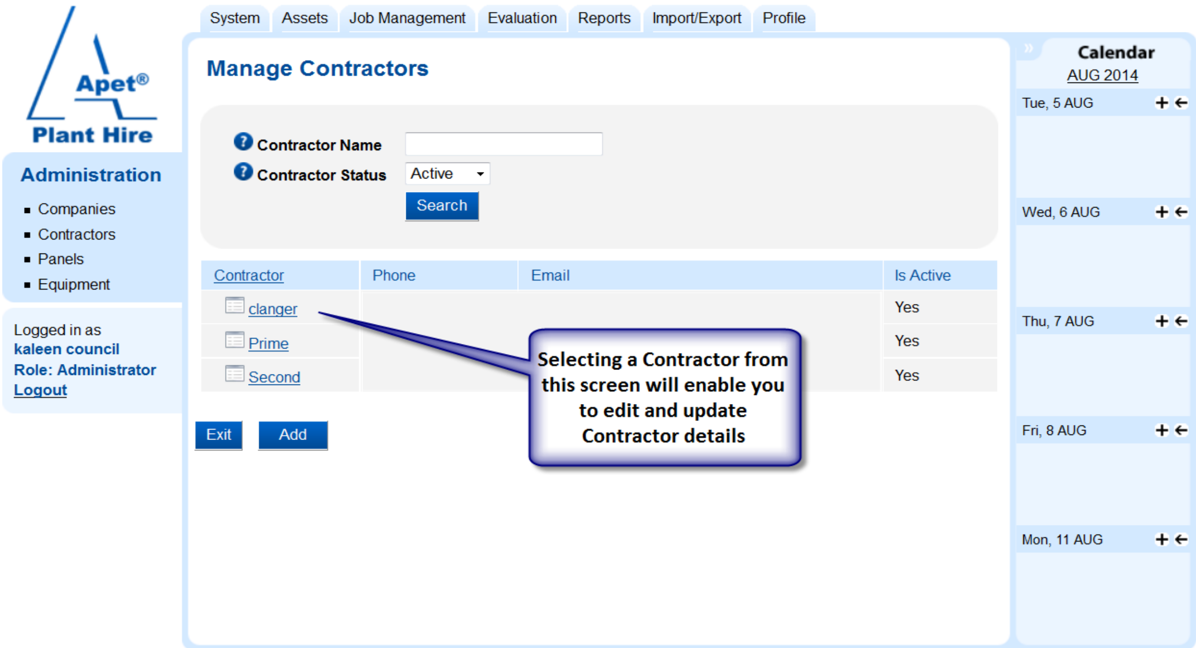

Figure 7 Edit Contractor details

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How to add new Panels

Note: Only an Admin User can add new Panels.

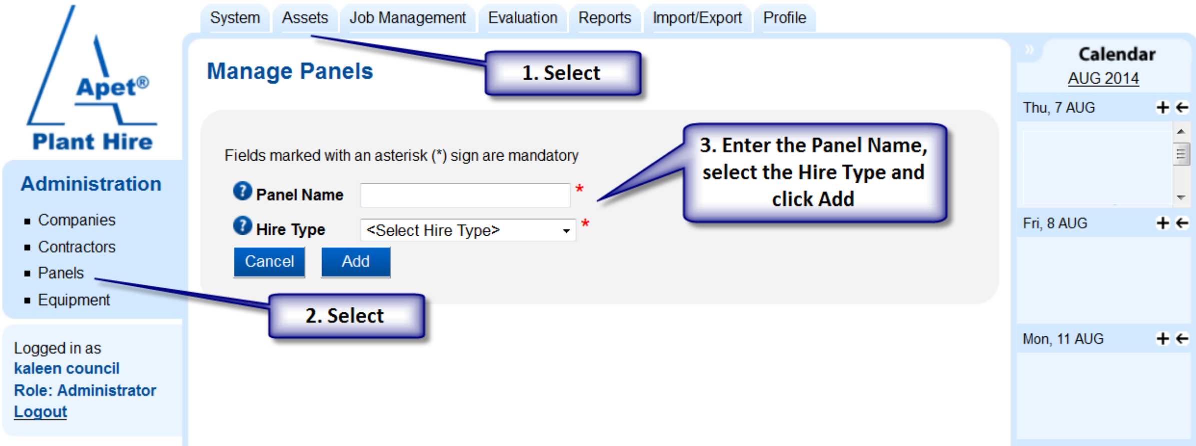

Figure 8 Adding a new Panel

How to add new Equipment

Note: Only an Admin User can add new Equipment (you will need to add Asset Classes first).

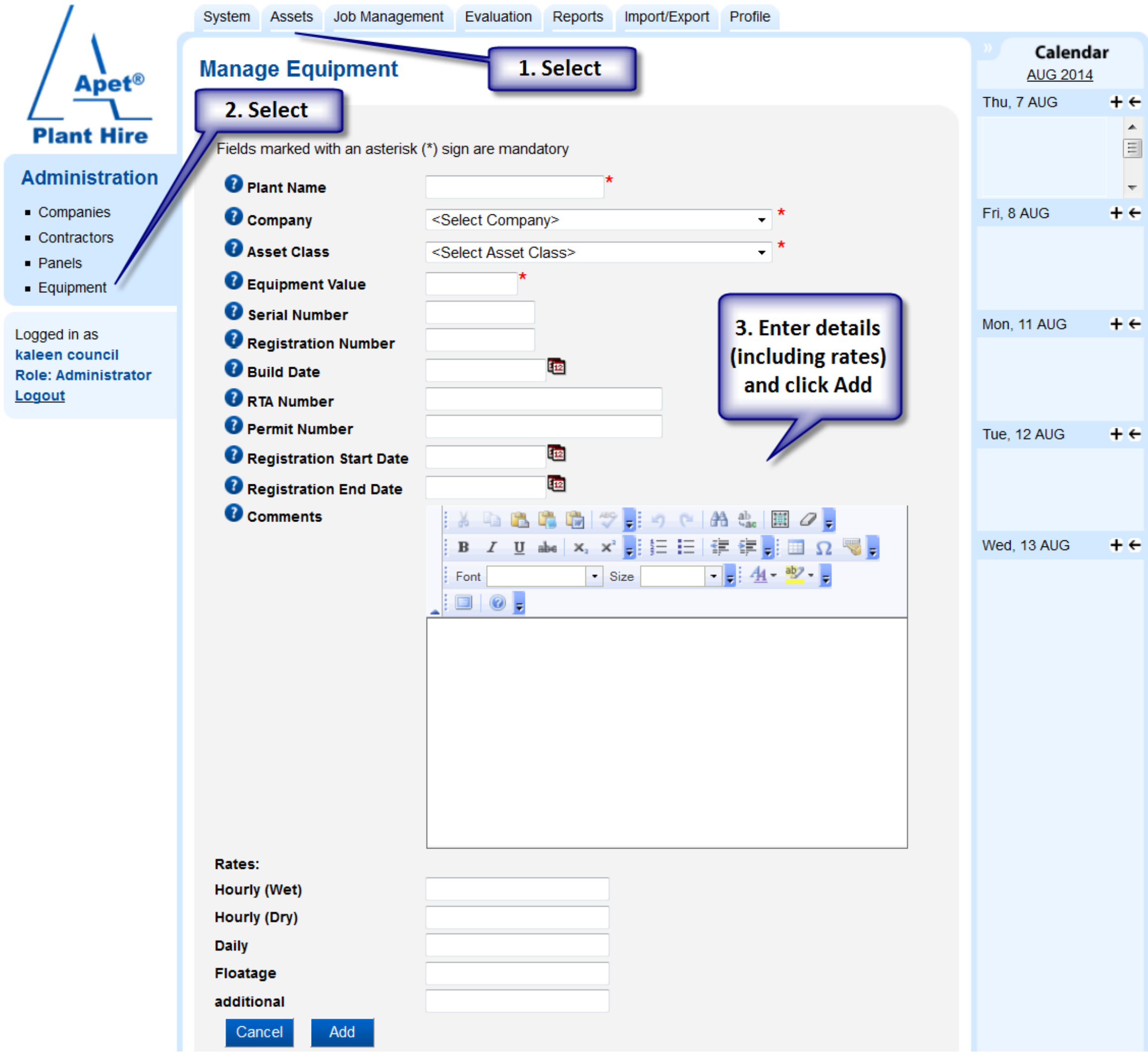

Figure 9 Adding new Equipment

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Reference Data

PlantHire™ functionality is dependent on defining the following reference data concepts for your organisation:

Reference Concept	Purpose	Examples
Equipment Types	To identify Equipment types	Grader, Backhoe, Skidsteer Loader
Asset Classes	Note: *Equipment Types* must be defined first. To identify the Asset class of machinery available	Cat SSL 10, Volvo B10
Assessment Types	A way of categorising assessment classes	On Site, Equipment condition, Desktop review
Assessment Classes	A way of categorising assessment points	Site prep, Timeliness
Compliance Types	To identify compliance requirements against Contractors	First Aid certificates, Operating licences etc
Hire Types	To identify what type of hire is required for specific jobs	Dry Hire, Wet Hire, Operator only
Job Status	To identify the status of particular jobs and identify if the status is Inactive (hidden)	Booked, Active, Completed
Job Line Selection Reasons	To identify the reason why a job line is added to a job	Availability, Cheapest, Customer Request
Insurance Types	To identify what insurance types are required	Public Liability, Work cover, Vehicle
Ratings	To identify the rating of a particular supplier within a panel	Excellent, Good, Unsatisfactory
Capacity Units	To identify the capacity of an asset class	kW, Tonnes, m^2

Setting up Reference Data (Dependencies)

Note: Only an Admin User can set up Reference Data.

Because of reference data dependencies it is important to build your reference data in a specific order.

- **Equipment Types** must be defined before **Asset Classes**
- **Assessment Types** must be defined before **Assessment Classes**

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How to set up Equipment Types

You will need to ensure you have created enough equipment types to cover the make/s and model/s (i.e. Asset classes) you plan on defining.

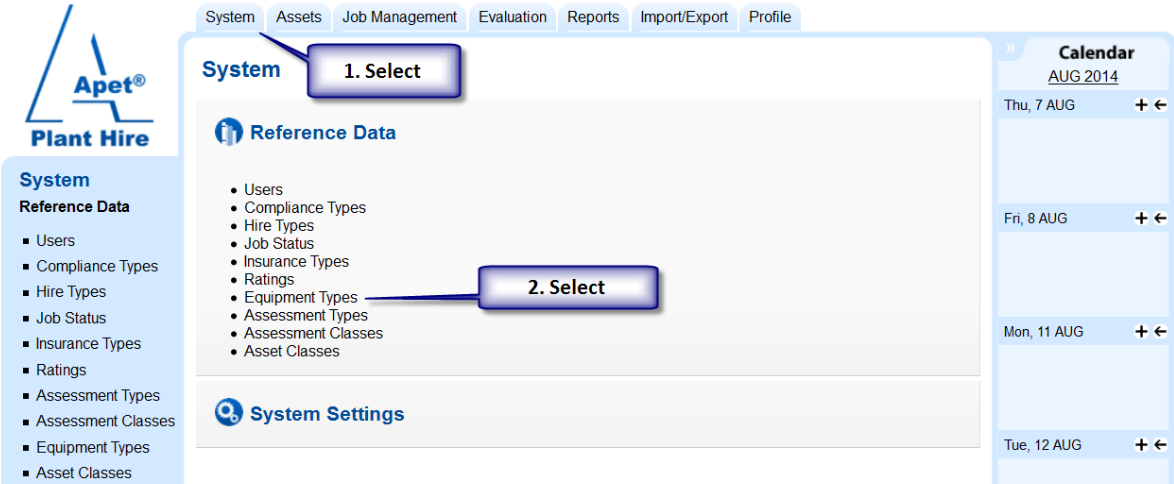


Figure 10 Setting up Equipment Types

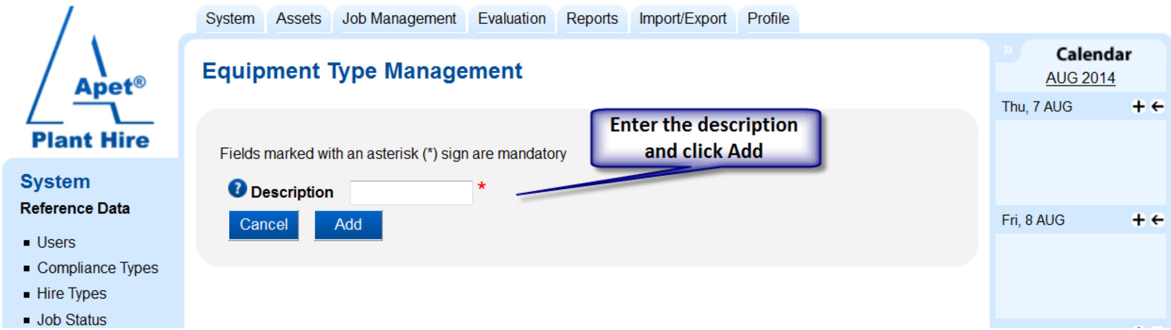
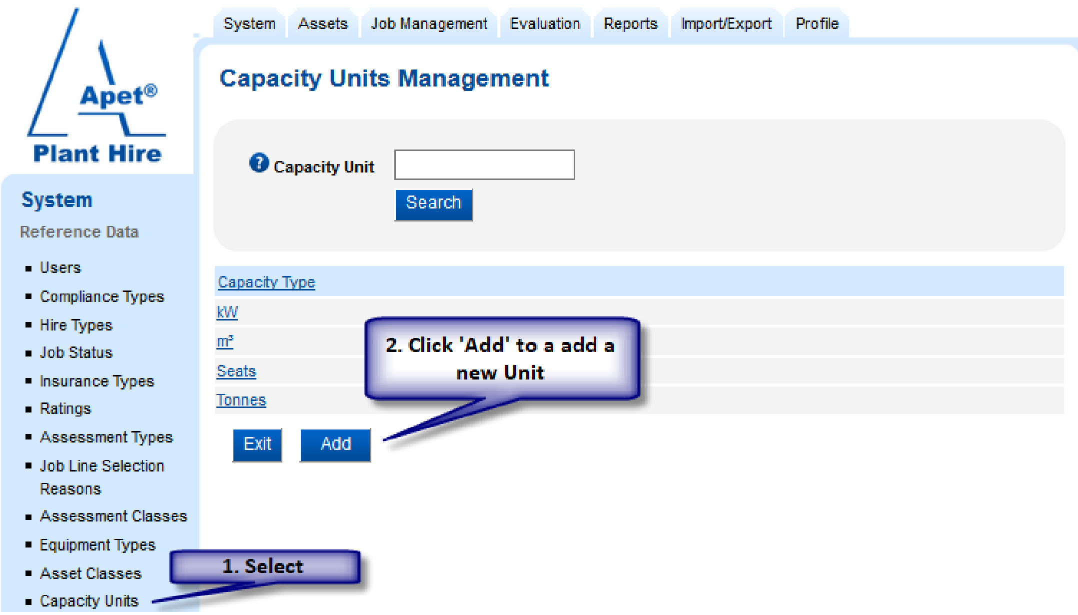


Figure 11 Adding a new Equipment Type

Example: Grader, Backhoe, Skidsteer Loader, Backhoe, Dozer, Dump truck, Excavator, Paver, Profiler, Roller

How to set up Capacity Units

Capacity Units allow you to enter the capacity for a specific asset class (kW, Tonnes, etc). After you have created a Capacity Unit you can assign it to an [Asset Class](#).



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When a capacity unit has been assigned to an Asset Class, there will be a:

- Capacity field on the Manage Equipment view for that Equipment item
- Capacity column in the Equipment search table (in Manage Equipment view and Job Line Item creation),
- Capacity field will be available for Providers to fill-in when offering a piece of equipment via the 360Pro Provider portal.

How to set up Asset Class

Asset Classes are a descriptor of the type of equipment and usually relate to the capacity of the equipment. ASTM F2446 - 04(2010) may be used as a reference framework.

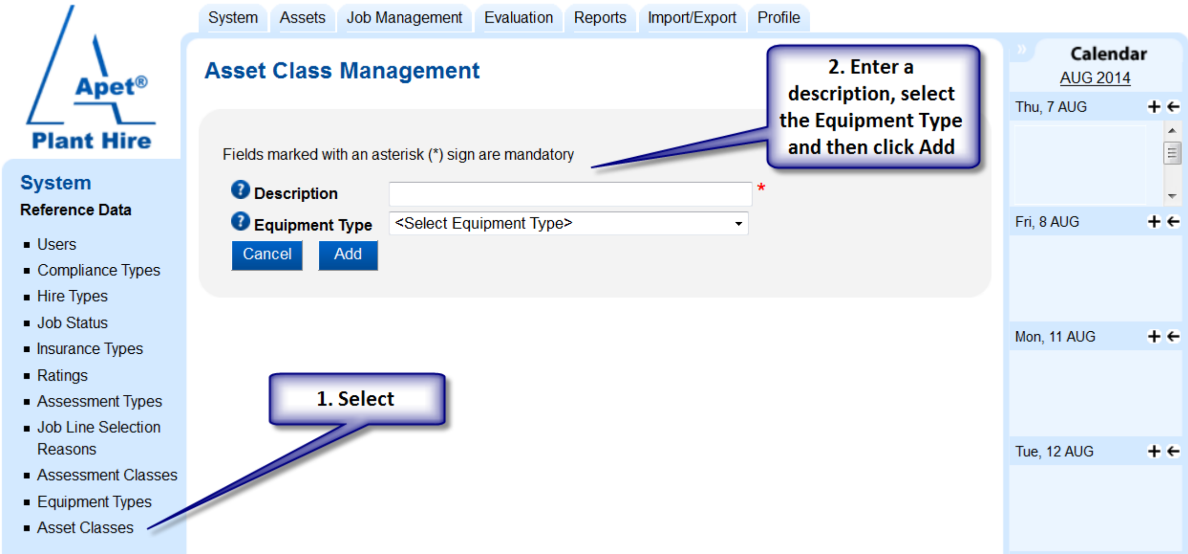

Figure 12 Setting up Asset Classes

Example: Cat SSL 10, Volvo B10, 20,000 GVM 6x4 Tray Back

To import a bulk amount of Asset Class information, it be can be imported by clicking on the Import/Export tab at the top of the PlantHire™ page.

How to set up an accessory for an Asset Class

Accessories (or attachments) can be linked to an Asset Class so that rates can be entered for a specific accessory.

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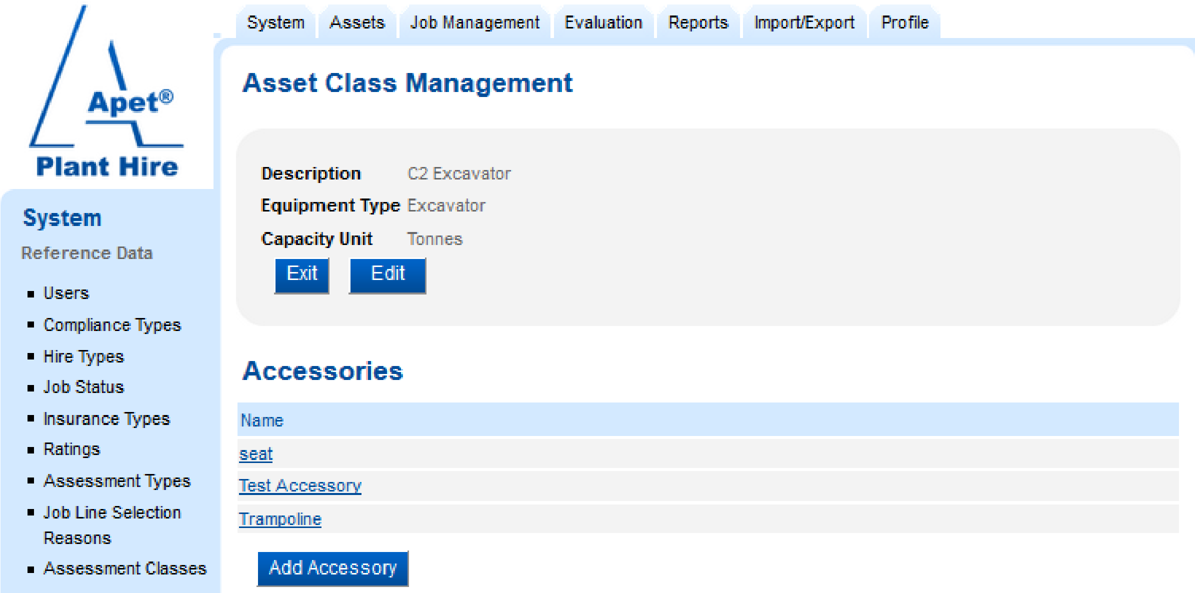

Figure 13 Setting up an Accessory

Assessment Framework

An important part of managing plant hire arrangements is ongoing assessment against key performance indicator measures.

You can achieve this in PlantHire™ by setting up your Key Performance Indicators as follows: (Note PlantHire™ Assessment data references in red)

Key Performance Indicator Measure (Assessment Class)	KPI Group (Assessment Types)
Quality	Onsite
Safety	
On time	
Environmental	
condition	Equipment
safety equipment	

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How to set up Assessment Types

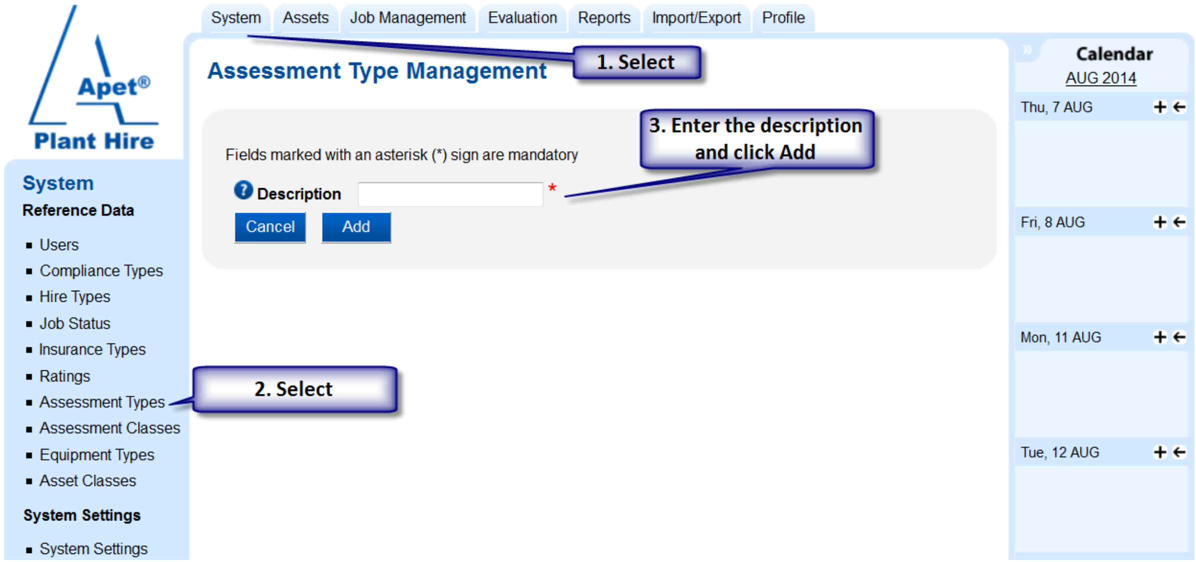

Figure 14 Setting up Assessment Types

Example: Onsite, Equipment condition, Desktop review

How to set up Assessment Classes

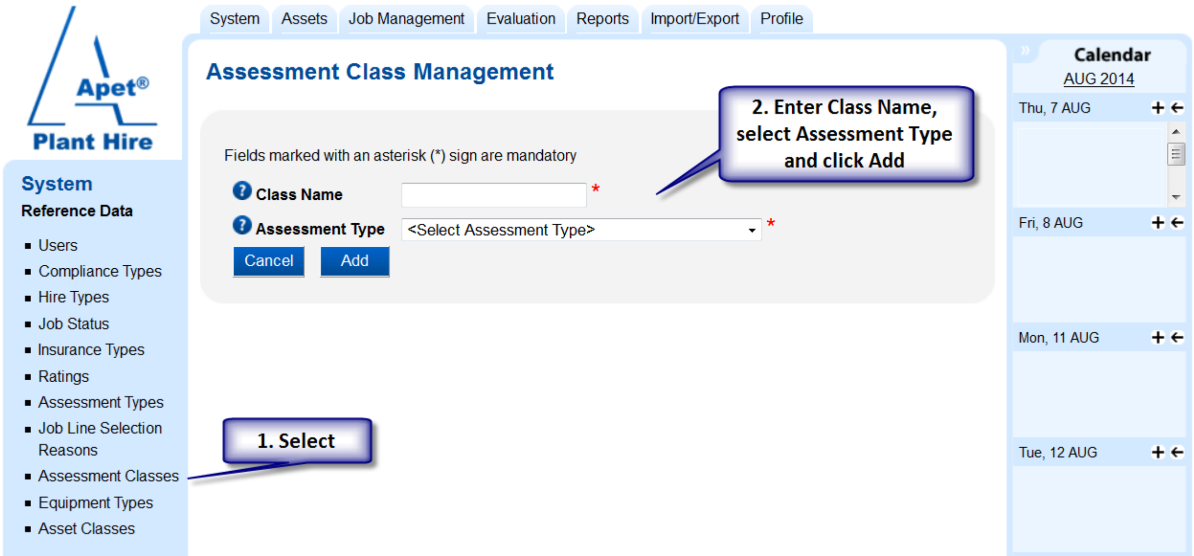

Figure 15 Setting up Assessment Classes

Example: Quality, Environmental mgt, On time, WHS compliance, Working relationship

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How to set up Ratings

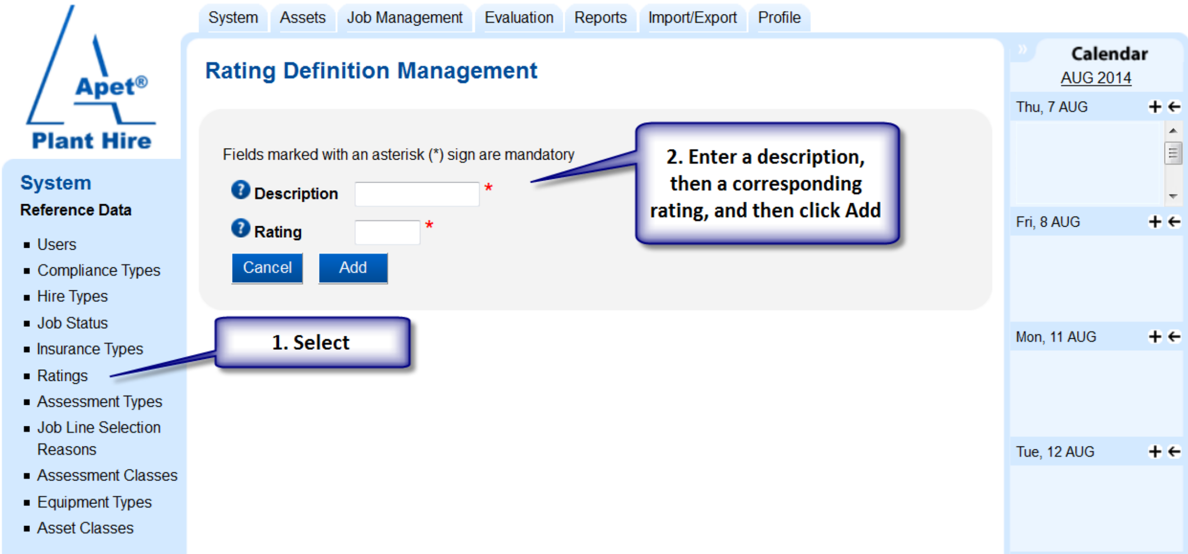

Figure 16 Setting up Ratings

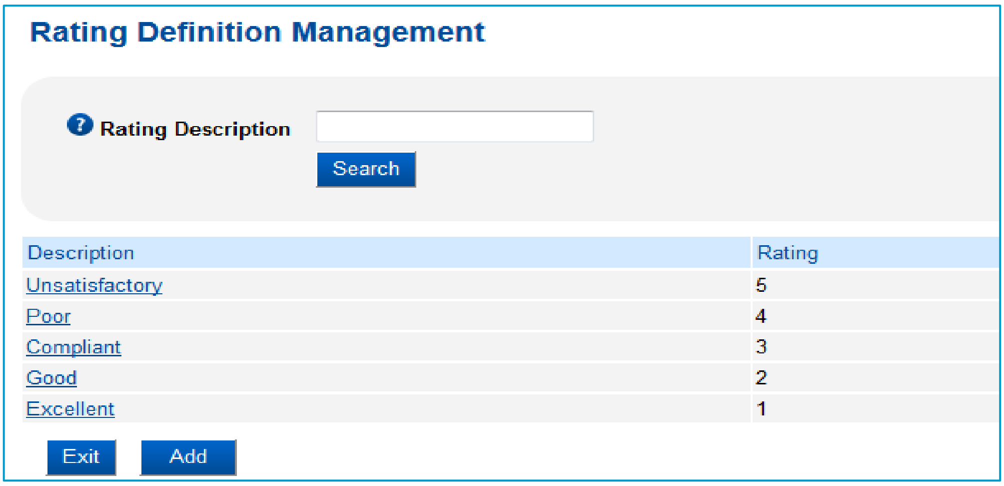

Figure 17 Example of rating definitions

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Other Reference Data

How to set up Compliance Types

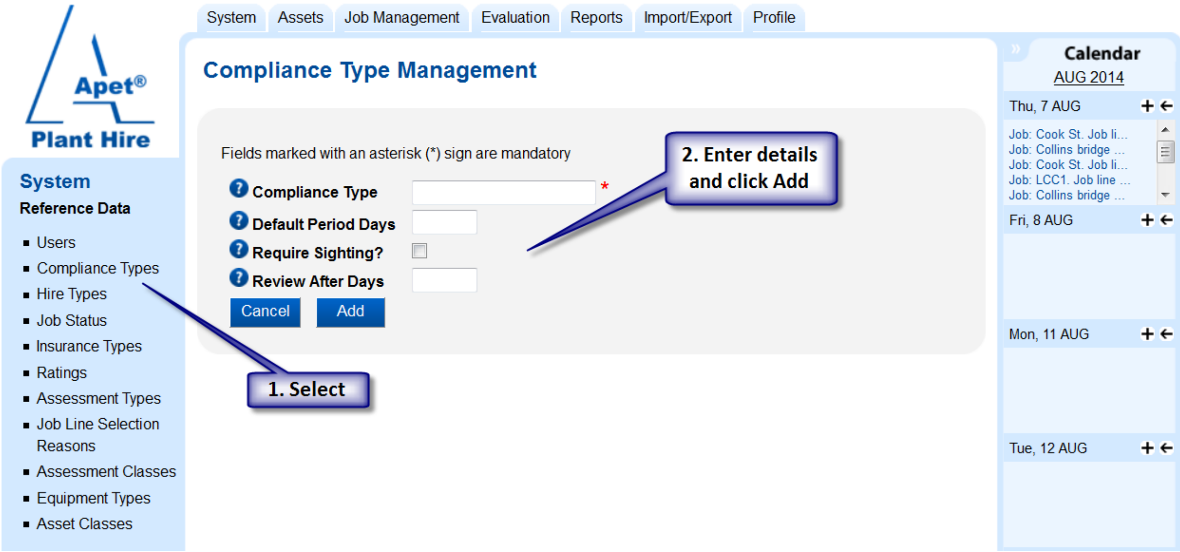

Figure 18 Setting up Compliance Types

Example: First Aid Certificate, HR Licence

Hire Types

The Hire Types are currently fixed in the system and are listed at System > Reference Data > Hire Types

Example: Dry, Wet, Operator Only

How to set up Job Status

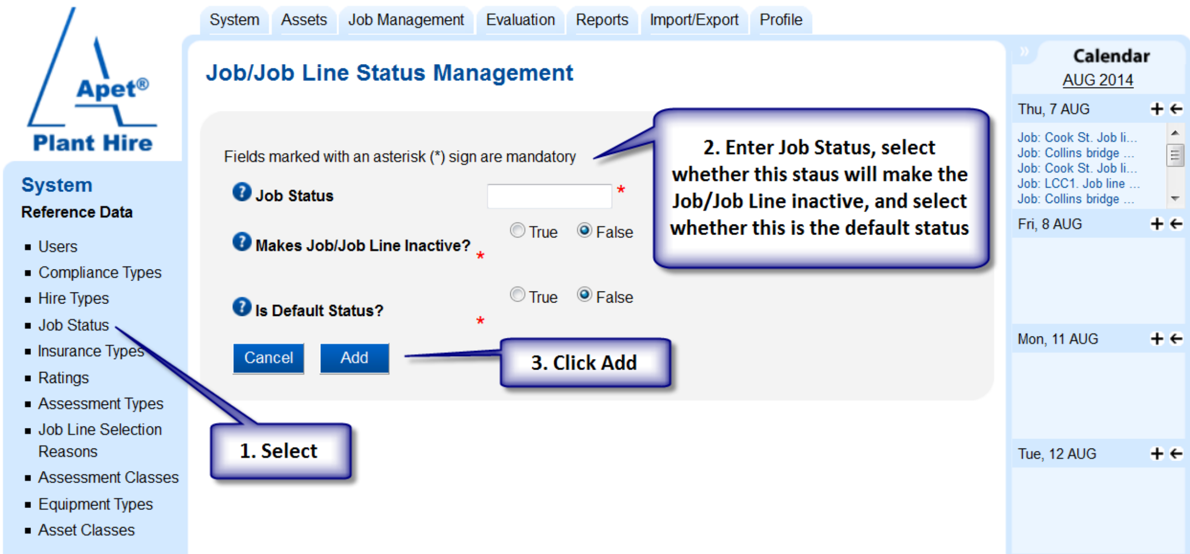

Figure 19 Setting up Job Status

Example: Active, Booked, Completed

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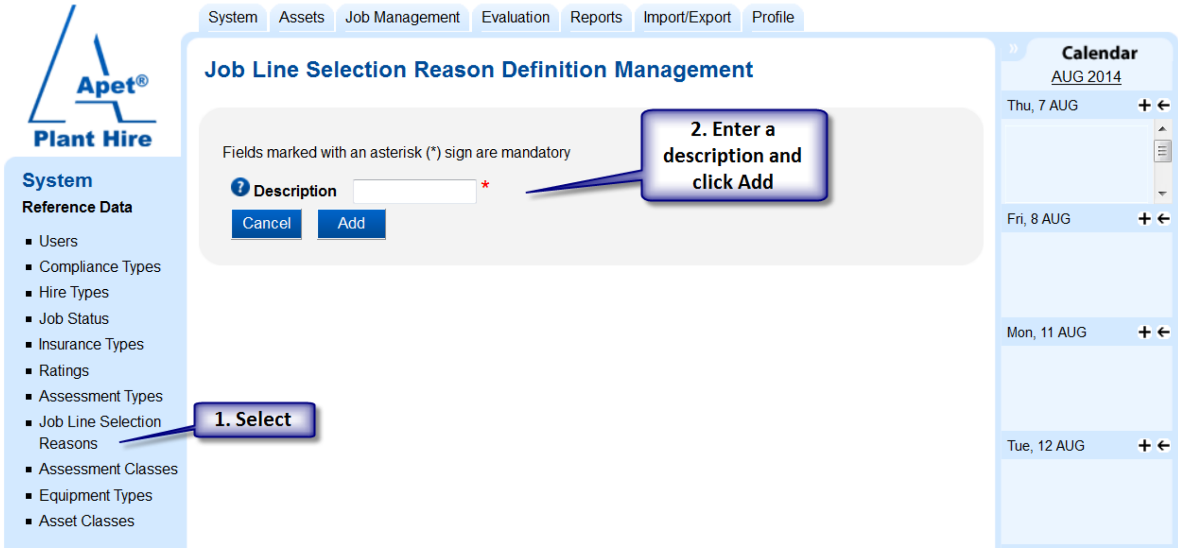
How to set up Job Line Selection Definitions



Example: Availability, Cheapest, Customer Request

How to set up Insurance Types

Insurance Type reference data is used for Company and Equipment Insurance details.

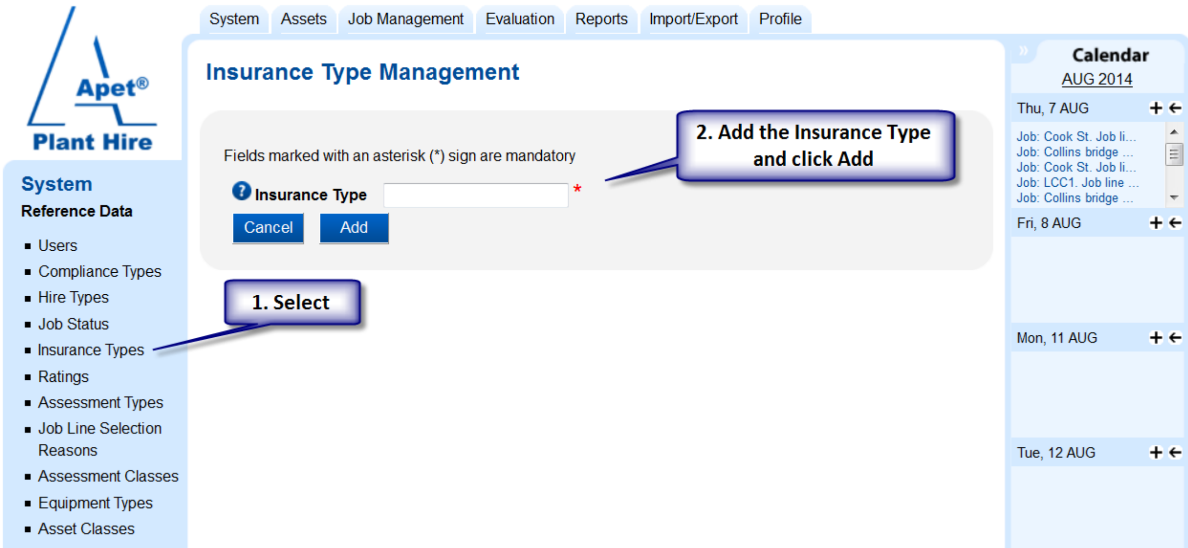


Figure 20 Setting up Insurance Types

Example: Motor Vehicle, Professional Liability, Public Indemnity, Workers Compensation
To manage Company and/Equipment insurance, please see Managing Insurance User Guide

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System Settings

System settings need to be established **before** a job is created.

Navigate to the System Settings to select your preferences.

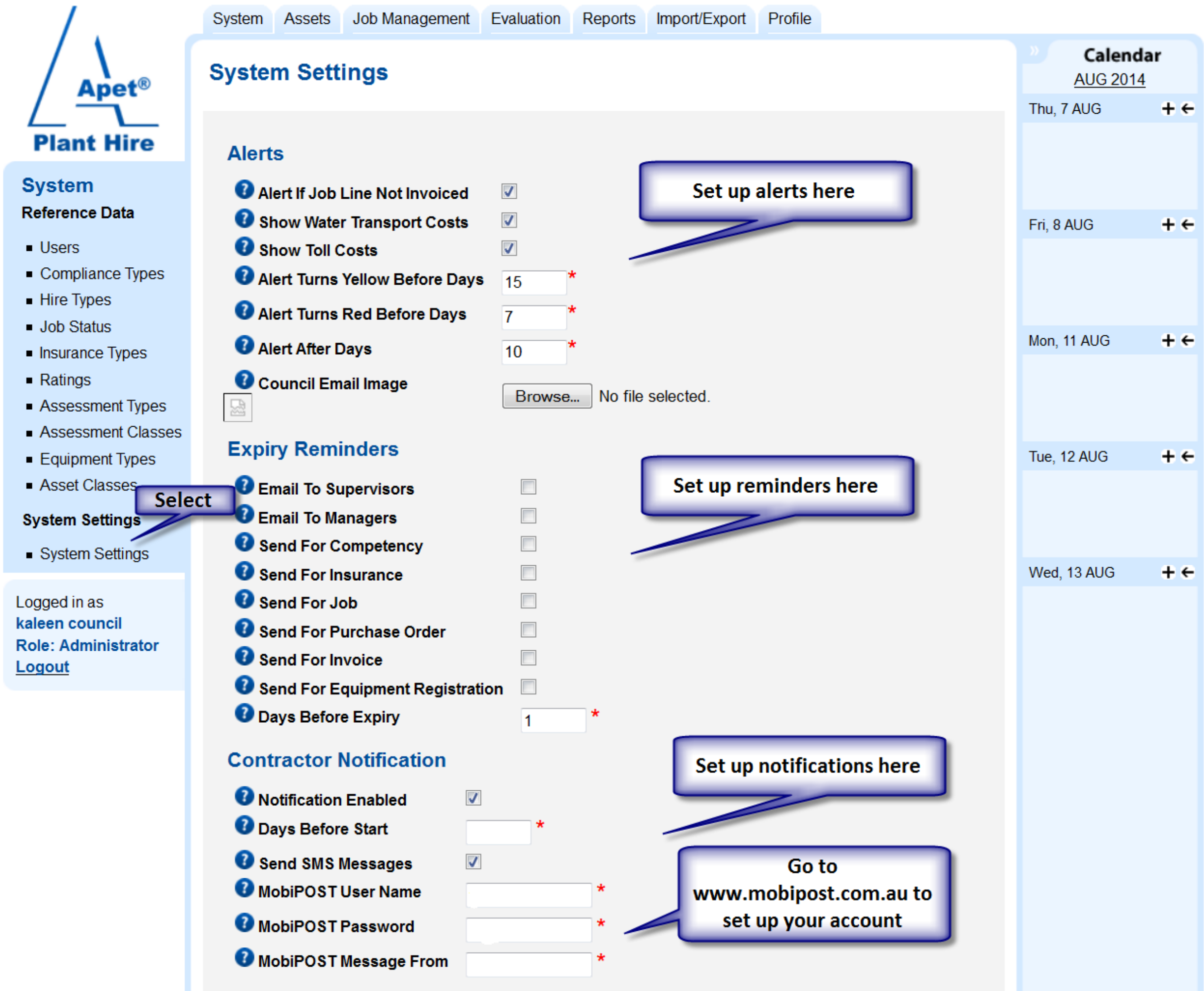

Figure 21 System Settings - Part 1

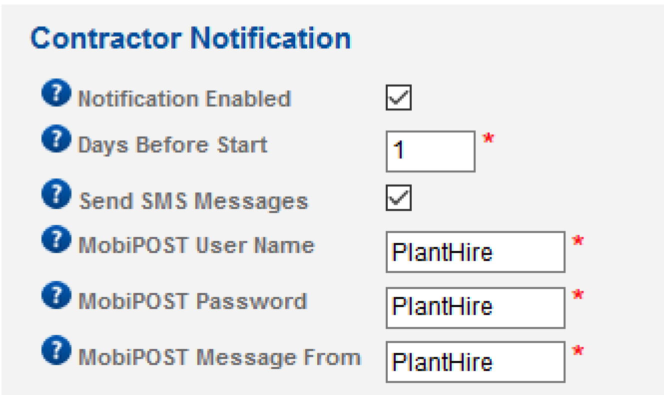

Figure 22 Details to add in Contractor Notification

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System Settings (Continued)

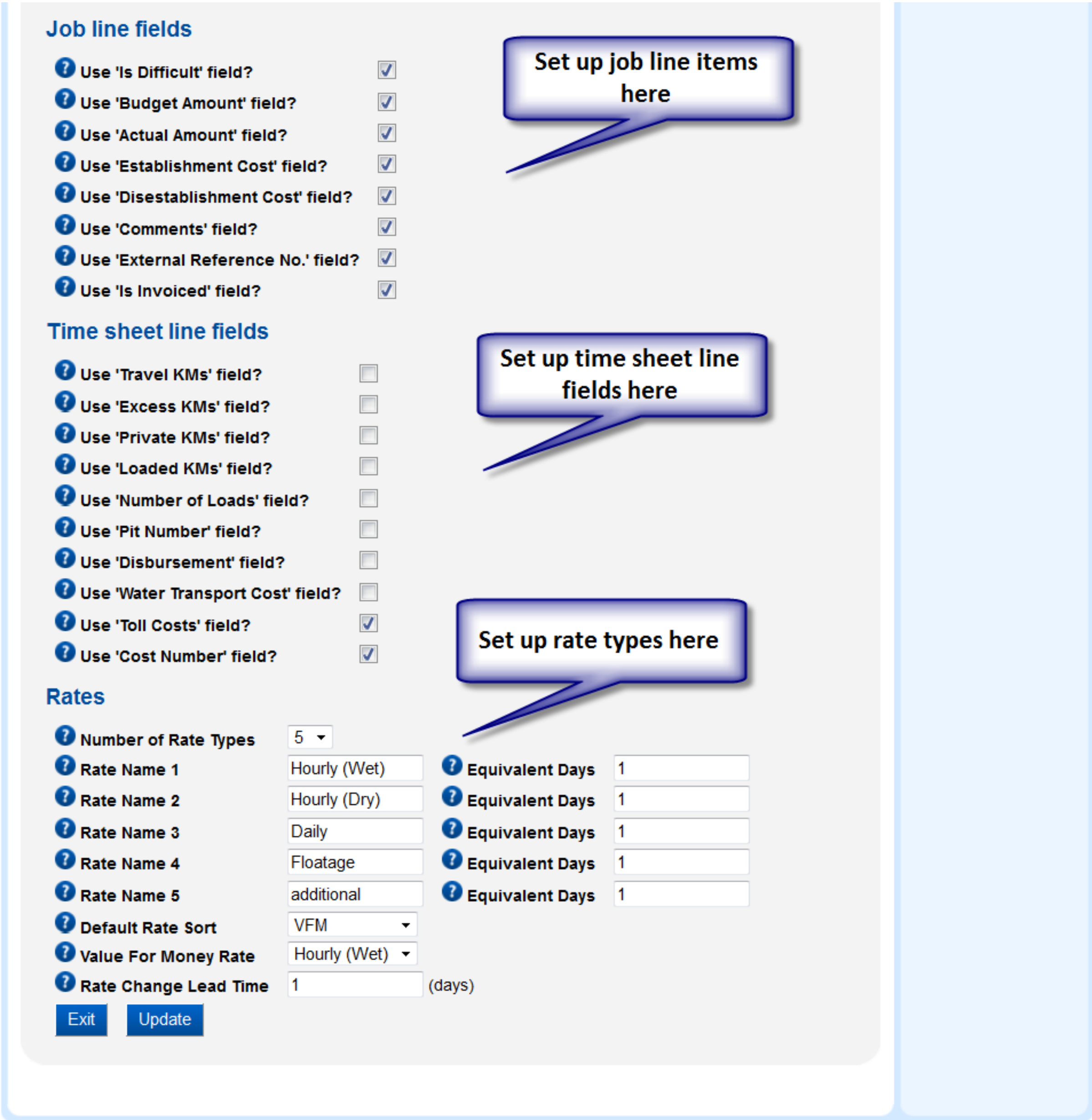

Figure 23 System Settings - Part 2

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Import/Export

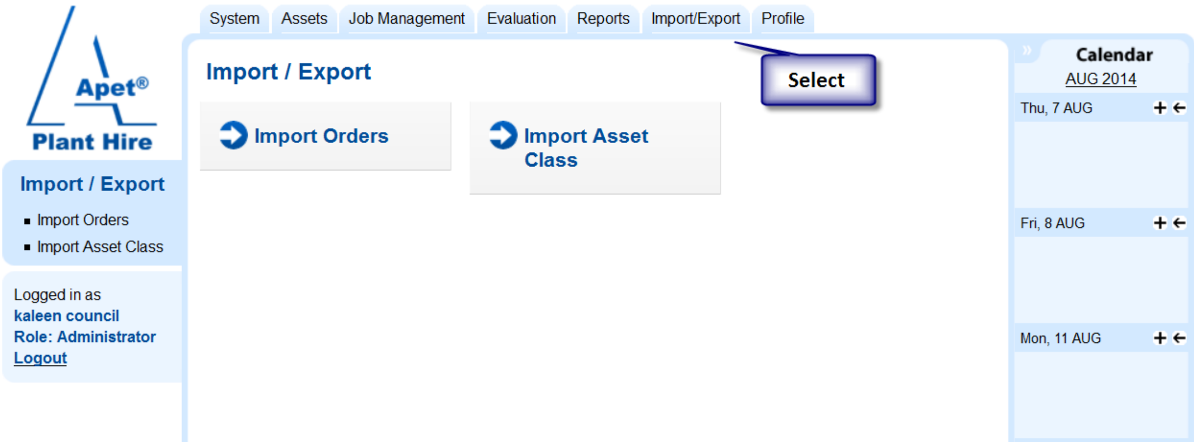

Figure 24 Import/Export home screen

Import Orders

The Import Orders function will enable you to import Purchase Order information via a .csv file. When you click 'Import Orders', you can download an example .csv file to populate and import (and a help file).

Import Asset Class

The Import Asset Class function will enable you to import Asset Class information via a .csv file. When you click 'Import Asset Class', you can download an example .csv file to populate and import (and a help file).

Profile

The Profile tab allows you to change your password and manage your calendar. In the Settings function, you are able to adjust your calendar settings, import calendar events from Outlook and export calendar events to Outlook

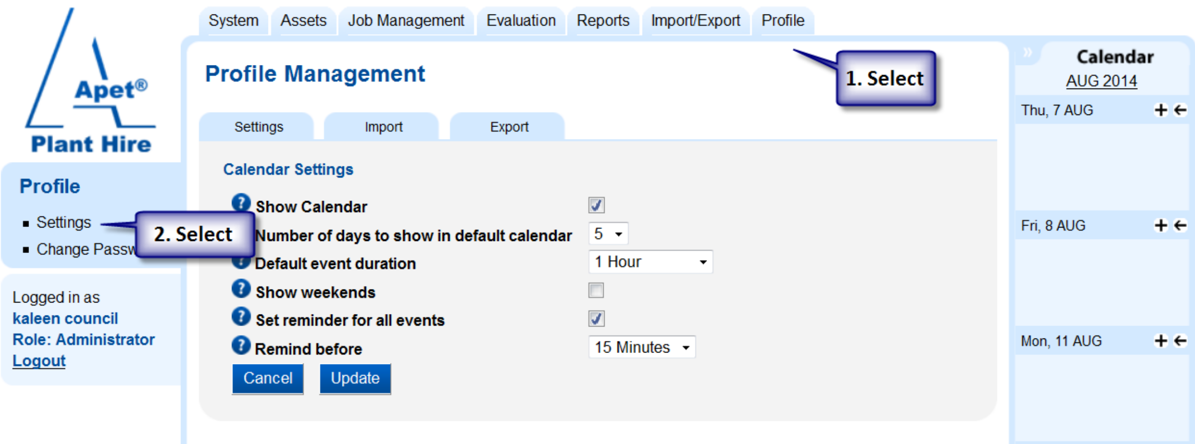

Figure 25 Calendar Settings

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Views

From the PlantHire™ home screen you are able to select different views depending on what task you would like to complete.

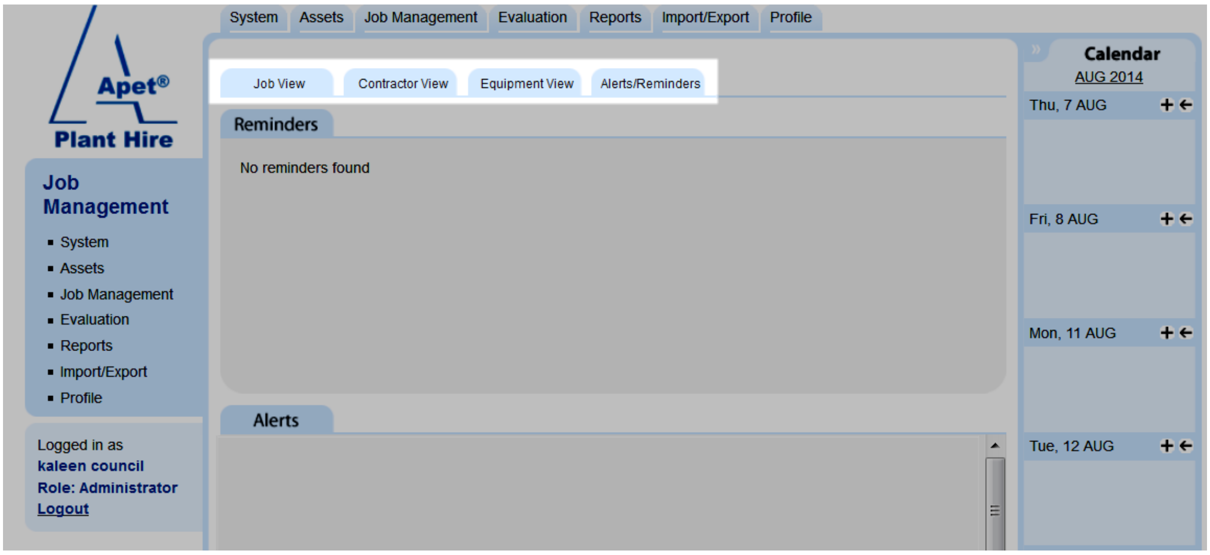

Figure 26 View options

Job View

From the Job View, you can see active jobs and click on the Manage Time Sheets or Add Assessment hyperlinks to quickly complete these tasks.

Contractor View

From the Contractor View, you can see a list of Contractors. Click on the Add Compliance, Add Rating or Add Assessment hyperlinks to quickly complete these tasks.

Equipment View

From the Equipment View, you can see a list of Equipment. Click on Add Rating or Add Assessment hyperlinks to quickly complete these tasks.

Alerts/Reminders

From the Alerts/Reminders View, you can see all alerts and reminders.

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