

How to review & export fleet/stock list

Administrators in Plant Assessor are often responsible for formulating and executing risk assessment plans. Part of this management function involves:

Making sure all machines needing assessment are set up in Plant Assessor

Making sure all machines in Plant Assessor have a future assessment date scheduled (if you have assessment scheduling functionality switched on-not relevant for suppliers)

This review and export function in Plant Assessor allows for data to be sorted and filtered and exported to Microsoft Excel for further manipulation, including comparison to asset/fleet lists etc.

Simply sort and filter the results to get the machines you wish to export using the options in the menu on the left hand side of the screen and click on the **EXPORT MACHINES** button.

1. Keyword Search
2. Find Machine(s)
3. Export Machines

The screenshot displays the 'Machines' management interface. On the left is a sidebar menu with the following items: '+ ADD NEW MACHINE', a search bar containing 'caterpillar' (marked with a red '1.'), 'FILTER BY', 'PRE START REPORT', 'SCHEDULE ASSESSMENTS', 'DUPLICATE ASSESSMENT', 'EXPORT MACHINES' (marked with a blue '3.'), and 'SAFE OPERATING PROCEDURES'. The main content area is titled 'Machines' and shows '3 Selected' machines. A gear icon with a checkmark (marked with a green '2.') is used to select machines. The list includes:

- Caterpillar - 226B HF (Loader, Skidsteer - Seated)**
Serial Number: CATXX226BX23456
Registration: ABC-123
- Caterpillar - 966K (Loader, Wheel)**
Serial Number: MDG EXAMPLE
Owner: Plant Assessor Tech Dev
- Caterpillar - 226B2 (Loader, Skidsteer - Seated)**
Serial Number: CAT0226BXXX0112345
Owner: Plant Assessor Tech Dev

TIPS: When comparing Plant Assessor lists to stock/fleet list in Microsoft Excel - use data sorting to ensure the lists are sorted in the same order. This makes comparisons easier.