

How to schedule a future assessment

When creating and managing a schedule for a large number of machines, you wish to bulk schedule assessments.

This function sees you able to update the assessment schedule details for a group of machines.

To use this function, simply filter down to the group of machines (e.g. all backhoes in fleet,) click **SELECT ALL MACHINES**, click **SCHEDULE ASSESSMENTS** enter assessment date, assessor, assessment purpose and state.

1. Keyword Search
2. Select All Machines
3. Schedule Assessments
4. Enter details in pop-up window

The screenshot displays the 'Machines' management interface. On the left is a sidebar with navigation options: '+ ADD NEW MACHINE', 'Keyword Search', 'FILTER BY', 'PRE START REPORT', 'DOWNGRADE MACHINES', 'SCHEDULE ASSESSMENTS', 'EXPORT MACHINES', and 'SAFE OPERATING PROCEDURES'. The main area shows a list of machines with checkboxes for selection. A 'Select All Machines' option is also present. The 'Schedule Assessments' pop-up window is open, showing fields for Purpose, To Be Assessed On (with a calendar icon), Assessor, and State, along with 'SAVE' and 'CANCEL' buttons. The number of machines selected is shown as 2.

NOTE: When bulk scheduling, you can assign some or all of the following aspects of future assessment(s):
Next assessment date, assessor, purpose and state.