Plant Training Guide

Using the Main Application v1.0

WHS

Version Control

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Contents

Terms used in this guide

For the purpose of this guide and use of the forms, the below table outlines terms and abbreviations used throughout the Main Application.

Term / Abbreviation	Description
Attachments	Any document or file such as a photo, Word document or scanned document. Title is a meaningful description of what the attachment is.
Category	The category the plant / equipment is associated with such as mobile, vehicle, laser, workshop, laboratory.
Checklists	Lists all the checklists associated with the plant / equipment item. Types of checklist include inspection and decommissioning checklists.
Company / School / Division	Is the School / Division area of the University or company the Reported By Person works for (i.e. a contractor).
Corrective Actions	Actions taken to correct the issues relating to a hazard. Actions may include cleaning up spills, moving boxes away from an area where people may trip over them or may be more complex involving a number of steps and / or actions.
Documents	Located on the left of the form. Provides a means to attach any documentation to the plant / equipment record.
Entity	An item on the left side list of the Main Application that stores records of the same type such as Hazard, Incident and Audit. Like a container full of one type of candy.
Equipment	In terms of FlinSafe, this is any item of equipment, device or fitting classified as Plant under the WHS legislation.
Existing Risk Management	Lists the risk management records (or risk assessments) associated with the plant / equipment item.
Faculty / Portfolio	The main administrative unit that manages the area where the hazard is located (if known). There are 4 main Faculties and a number of Portfolios within the University.
Further Location Details	Extra details that provide a more specific description of the where the hazard is located. Even if a Site and Location are chosen, details can be entered here to more describe the location such as 'the North Western corner of the courtyard.'
Hazard	A situation or thing which has the potential to harm a person. An example might be boxes left in a corridor where someone may trip over them.
Hire / Lease Details	The details of a plant / equipment item that is hired or leased from another company for a period of time. FlinSafe allows recording details and can notify about expiry.
Location	Is a building or area outside that relates to the Site chosen. If a Location cannot be found then choose 'Not Listed.' If 'Not Listed' is chosen then Further Location Details will need to be entered to help identify where the hazard is located.
Moderator Team	Is a person or team that looks after hazards reported for their School / Division and makes sure the hazards are reported to the correct people in the University.
Plant/Equipment Owner	The person responsible for the plant / equipment and often the person that purchased and uses the equipment.
Recertification Date	When the item of plant / equipment is due to be recertified by the Regulator. The Notification date triggers a reminder notification for this.
Red Asterisk (*)	Used to identify that a detail is mandatory (required) to be entered before submitting the hazard.
Registration Number	The number given by the Regulator when the plant / equipment item is registered.
Regulator	An authoritative organisation that provides advice and also enforces legislation it is associated with. For example, Safe Work SA is the regulator for the WHS legislation in South Australia.
School / Division (Location)	This is the administrative area within the Faculty / Portfolio that manages the area where the hazard is located (if known).
Site	The campus or main area the University owns or works in. If the Site cannot be found, then choose 'Not Listed.' If 'Not Listed' is chosen then Further Location Details will need to be entered to help identify where the hazard is located.
WHS Unit	Work Health and Safety Unit is the University's central unit for providing expert advice and assistance to the University community on Work Health and Safety matters.

Plant Overview

Plant / Equipment can be recorded by Moderators, Management and the WHS Unit.
The Main Application allows the recording of plant / equipment details, including serial number, model number, regulator registration details and lease / hire details, through a web interface. Access is limited Moderators, the WHS Unit and some levels of Management.

The web site cannot be accessed via the Portal interfaces.

Supported Web Browsers include Internet Explorer and Safari.

Note: The term 'plant' will be used in this guide to describe an item of equipment, attachment or device that needs to be recorded in FlinSafe.

Main Application

The following information provides an overview of steps required to process an item of plant / equipment using the **Main Application**:

Recording a Plant / Equipment record

1. Recording the Plant / Equipment item
    a. Entering Location Details of where the plant is located
        i. If the location relates to an area of the University (i.e. Education Building may be Faculty / Portfolio = Faculty of Education, Humanities and Law; School / Division = School of Education), then the Faculty / Portfolio and School / Division details may be entered
    b. Details of the plant itself, including identifying details such as model and serial numbers, as well as an asset number and description
    c. Regulator details, if the plant is registered or will be registered with a Regulator (i.e. Safe Work SA)
    d. Hire / Lease details, if the plant item is hired or leased from another company
    e. Attaching any documents, including photos or a document with more details to help in further identifying of the item of plant
    f. Submitting the plant record
2. Reviewing Existing Risk Management records
    a. Review risk management records associated with the plant item
    b. Adding new risk management records to plant
3. Reviewing Checklist records
    a. Review checklist records associated with the plant item
    b. Adding new checklist records to plant
4. Working with Plant registered with a Regulator
    a. Updating registration details on renewal (after notification)
5. Working with Plant on lease / hire
    a. Updating lease / hire details on expiry or renewal (after notification)
6. Decommissioning plant records
    a. Deactivation of a plant record

Logging in Externally (i.e. from home)

The web site can be accessed via https://flinsafe.flinders.edu.au/SCRIM/.

Note: To be able to access the web site externally from the Flinders University computer network, a VPN Client will likely be required. This can be obtained through Flinders University ITS Support.

When accessing the Main Application from outside of the Flinders University network, the following window will be displayed:
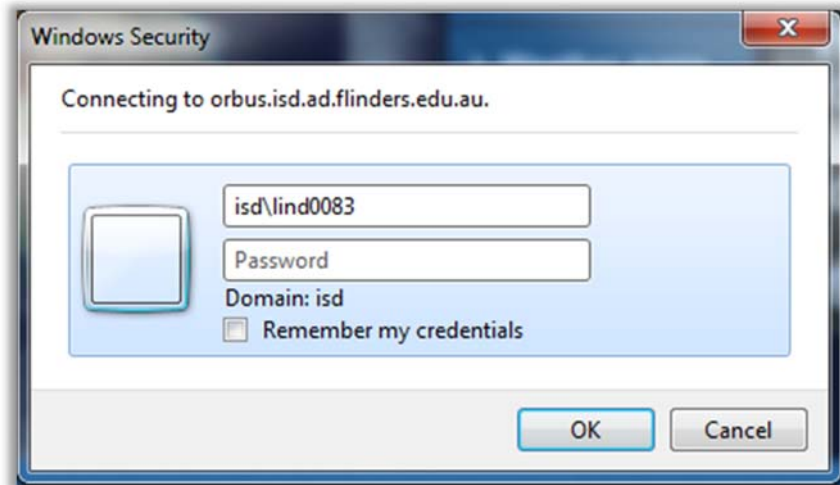
In addition to the normal login details, the login should have the following:

Username (top box): isd*<FAN>*
Password: *<FAN password>*

For example:

Username: isd\test0001

Note: It is suggested that you do <u>not</u> tick the remember my credentials, especially when using a publicly available computer, as this compromises the security of your login. It is also suggested that once you have finished your work in the Main Application, that you close any open browser windows.

1. Entering a Plant record

Plant records are reported via the Main Application only. The records are not available from the Portals. The following instructions show how to enter a plant record through the Main Application.
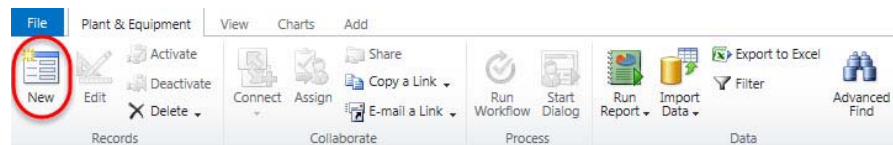Please connect to the Flinders University Network then go to https://flinsafe.flinders.edu.au/SCRIM/

- From the left menu select SCRIM Modules > Plant (see **Figure 01a** below)
- Select 'New' from the top menu bar (see **Figure 01b** below)

(Figure 01a: Left Menu)   *(Figure 01b: Menu bar)*
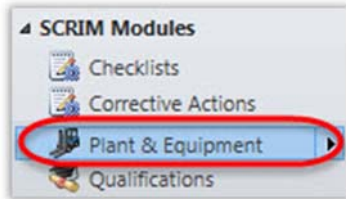
The **New Plant & Equipment** form in **Figure 02** will appear. Please complete section 1 and part of section 2 as explained below.

Helpful Hints:
Mandatory: All fields marked with a red asterisk (*) must be completed before the record can be saved.

Greyed-out fields: You are unable to enter anything in these fields. Note: A greyed-out field will automatically populate with a value when a report is saved or is populated from another source for example the Risk management and Checklist entities.

① ***General Details:*** Enter the name of the plant item, as well as the category it belongs to. Asset number recording is available if one has been assigned to this plant item.

② ***Location Details:*** Enter the location details of where the plant item is located. 'Further Location Details' should be used to help describe the site and location details in more detail.

③ ***Plant or Equipment Detail:*** Enter details regarding model number, serial number and manufacture details as applicable to the plant item.

(Figure 02: New Plant record)

For the following items, please refer to **Figure 03** below.

④   *Description of Plant or Equipment:* Describe the Plant in detail.

⑤   *Plant/Equipment Registration Details:* Only enter details in this section if the plant item is registered with a Regulator (i.e. SafeWork SA). It includes provision to describe the plant owner's details and also about notification regarding the recertification of the plant item. Regulator details can only be entered if the question '**Is the Plant/Equipment Registered with a Regulator?**' is answered as **'Yes.'** Note that the Regulator Name and Registration Number will become mandatory when this occurs.

⑥   *Hire / Lease Details:* Only enter the details in this section if the plant is hired or leased. This section provides details on the hiring company, contact and notification details of when the lease / hire expires.

(Figure 03: Hazard Description)

Note: Details other than **Regulator Name and Registration Number** can be entered independently of the Regulator details. For example, a plant item will still have inspection dates. If notification date is used, it will trigger an email notification at that time and will incorrectly indicate re-registering with the Regulator. If the notification date is used without a Regulator, then concentrate on the details required to be updated.

Documents, such as registration documents, manuals and other documents, can be stored on FlinSafe using the Documents link on the left side of the Plant window (see **Figure 04** below).
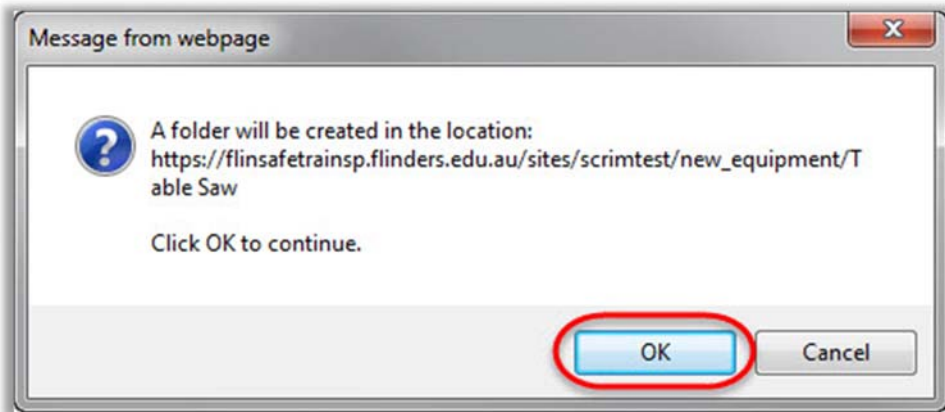
(Figure 04: Documents link)
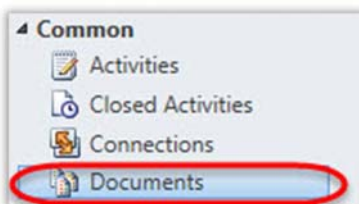
Click on the Documents link, wait a moment and answer the message that appears by clicking **OK** (see **Figure 05** below for an example).

(Figure 05: Documents message)

The document window will be displayed similar to **Figure 06** below.

For the following points, please refer to **Figure 06** below:

1. **Add button:** Opens an Add Document window to start adding files.

2. **Browse:** Click this button to browse for files much the same as Microsoft Word or Windows Explorer. Choose the file desired. Only one file can be chosen at a time.

3. **Completing add file process:** Click **OK** to save the file and attach it in the plant record.

(Figure 06: Adding files to the Documents window for the Plant item)
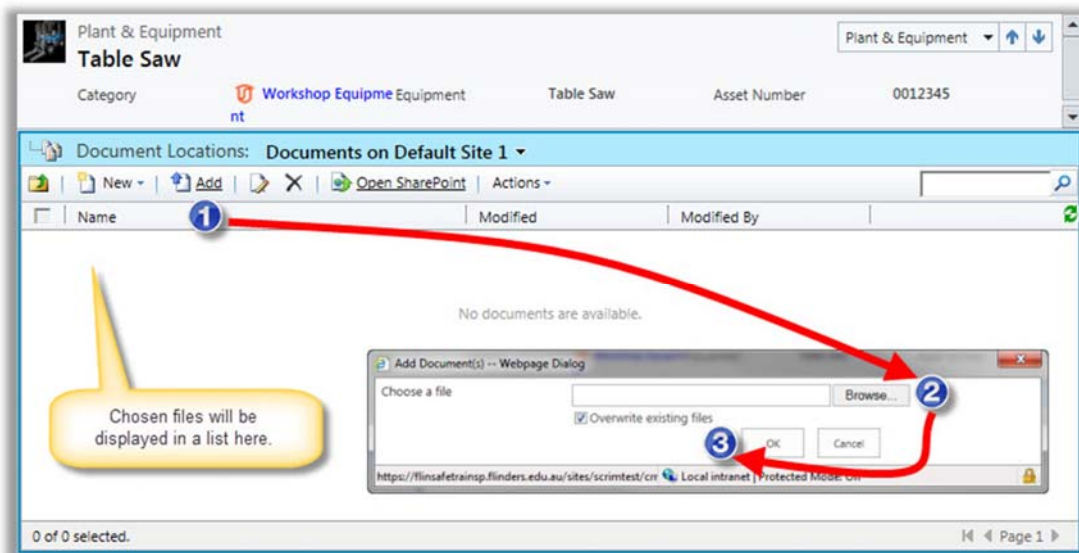
Up on the ribbon bar, click on the **Plant & Equipment** tab to return to the plant record details.

(Figure 07: Save report)

Save and Close the Plant record at this point, the remaining sections i.e. Existing Risk Management and Checklists will be completed during the use of the Risk Management and Checklist entities.

2. Reviewing Existing Risk Management and Checklist Records

To be able to create Risk Management and Checklist records for a Plant item, the Plant record must be created first in
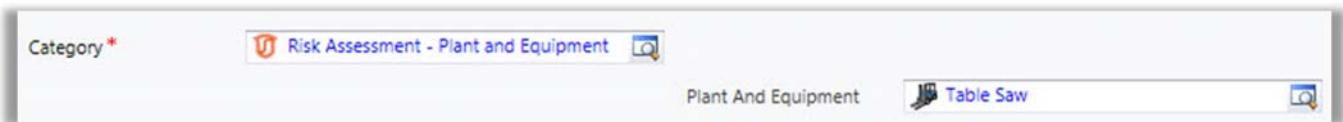below process:

1. Create Plant record
2. Save Plant record
3. Create new Risk Management record (for details of this please see the ***Risk Management User Guide***)
4. Choose the Risk Management Category as "Risk Assessment - Plant & Equipment"
5. Select the Plant Record for the "Plant and Equipment" box that is present. An example is below in **Figure 08**.

(Figure 08: Choosing a Risk Management Category for Plant)

6. Save the Risk Management record.
7. Create any Checklist records as required (i.e. Plant inspection, risk assessment checklist, decommissioning
   checklist). For further details on creating checklists please see the ***Checklist User Guide***.

After the above process has occurred, there will be records to view in the Plant record. Clicking on the **Reference ID**
of the Risk Management record will open it for viewing (as shown below in **Figure 09**). This is the same for **Checklist**
records that are displayed in the Checklist Sub Grid.

(Figure 09: Viewing a Risk Management record)

Closing the Risk Management or Checklists records after viewing should return you back to the Plant Record for
further review.

3. Working with Plant registered with a Regulator

Plant registered with a regulator, such as Safe Work SA, will need updating at intervals where the plant will need to be re-inspected and then recertified by the regulator. Prior to the interval expiring, the date in the **Notification Date** box will trigger a workflow to notify the **Record Owner** (not t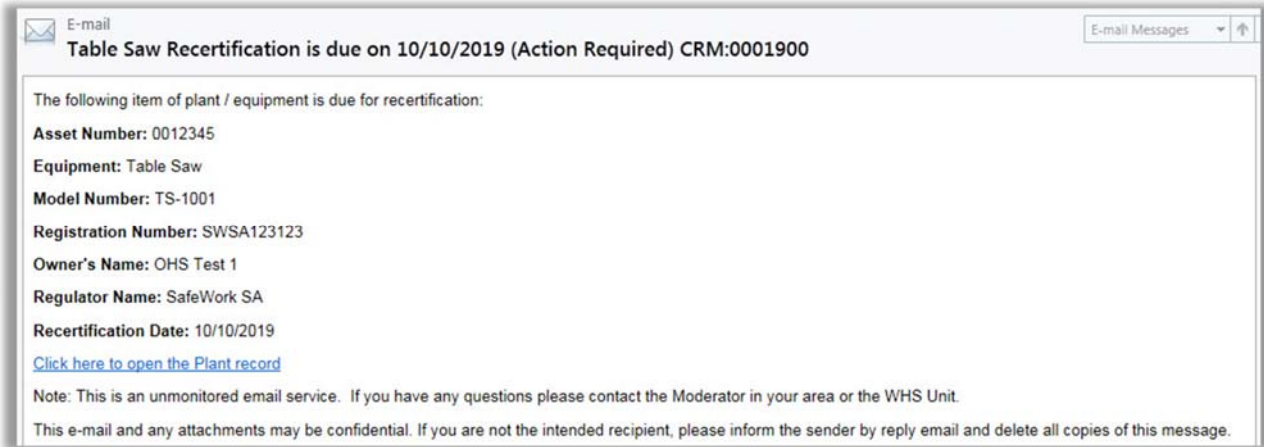he Plant Owner) that the plant item will need to be recertified / registered again with the regulator. **Figure 10** provides an example of the email that may be received:

(Figure 10: Re-certification email notification)

E-mail

Table Saw Recertification is due on 10/10/2019 (Action Required) CRM:0001900
E-mail Messages

The following item of plant / equipment is due for recertification:

Asset Number: 0012345

Equipment: Table Saw

Model Number: TS-1001

Registration Number: SWSA123123

Owner's Name: OHS Test 1

Regulator Name: SafeWork SA

Recertification Date: 10/10/2019

Click here to open the Plant record

Note: This is an unmonitored email service. If you have any questions please contact the Moderator in your area or the WHS Unit.

This e-mail and any attachments may be confidential. If you are not the intended recipient, please inform the sender by reply email and delete all copies of this message.

Note: If the recertification notification has been set for a period such as 5 years, then the notification will only be sent at that time.

For the following items please refer to **Figure 11** below.

    ① **Recertification Date:** This is the date the plant will be due to be recertified. Normally this field is used to show when the plant item needs to be re-registered with the Regulator. In cases where there is no regulator, this could be a local recertification date entered.

    ② **Notification Date:** This can be set any time before the plant is due to be recertified. It is recommended this should be at least 2 weeks in advance of the actual expiry date and probably no more than a month to be practical in reminding about the activity to be undertaken.

(Figure 11: Updating the Re-certification notification date)

Is the Plant/Equipment Registered With a Regulator ?

○ No   ● Yes

Plant/Equipment Registration Details

Regulator Name *	SafeWork SA	Registration Number * SWSA123123
Commission / Registration Date	10/10/2014	Last Inspection 10/10/2014
Recertification Date	① 10/10/2019	Notification Date ② 26/09/2019
Plant/Equipment Owner	OHS Test 1	Owner Number OWNER12

Once the Recertification Date and Notification Date are updated, the plant record needs to be saved by using the **Save & Close** button on the ribbon bar (see **Figure 12** below).

(Figure 12: Save & Close option)

Save   Save & Close

The notification will wait until the specified date and send a notification email to update the details the next time they need updating.

4. Working with Plant on lease or hire

Plant can be leased or hired from another organisation, which will require a contract with a start date and an end date. FlinSafe has the capability to record these details and provide a reminder when the lease / hire expiry is due (much the same as the recertification date process described in the previous section).

Note: If the lease / expiry reminder has been set for a period such as 5 years, then the notification will only be sent at that time.

For the following points please refer to **Figure 13** below:

1. **Hire / Lease Start Date:** This is the date the lease / hire period started. This can be updated to the new lease / hire period start date when it starts its second or subsequent hire / lease periods.

2. **Hire / Lease End Date:** This is the date the lease / hire period finished. This can also be updated to the new lease / hire period end date when it occurs in the second or subsequent hire / lease periods.

3. **Lease Expiry Reminder:** This can be set any time before the plant is due to be returned or re-leased / re-hired. It is recommended this should be at least 2 weeks in advance of the actual expiry date and probably no more than a month to be practical in reminding about the activity to be undertaken.

(Figure 13: Updating Lease / Hire details)

Once the Hire / Lease Start Date, End Date and Lease Expiry Reminder Date are updated, the plant record needs to be saved by using the **Save & Close** button on the ribbon bar (see **Figure 14** below).

(Figure 14: Save & Close option)
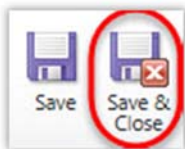
The hire / lease notification will wait until the specified date and send a notification email to update the details the next time they need updating.

5. Decommissioning and reactivating Plant records

Plant records do not have an expiry date and would be updated over the working life of the plant item. However, when the time comes to decommission an item of plant there is a process designed to perform this in FlinSafe. It is important to go through the appropriate processes when dealing with plant, including providing documented evidence of when the plant is decommissioned. This includes attaching that documentation to the plant record as shown previously on **pages 7 and 8**.
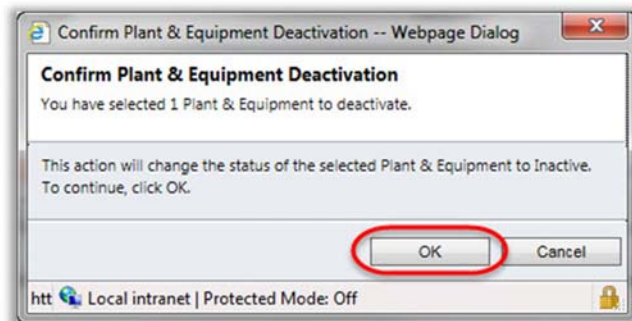
5a. Decommissioning a Plant Record

To decommission a plant item, open the record in FlinSafe and click on **Deactivate** in the ribbon bar adjacent the Save & Close button (see **Figure 15** below).

(Figure 15: Deactivating a plant record)

A message will appear where the **OK** button can be clicked to deactivate the record (see **Figure 16** below).

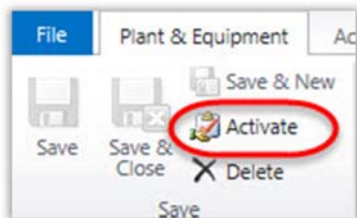*(Figure 16: Confirming deactivation of a plant record)*

The plant record can be closed and will not appear on the 'Active' plant register any more. The record will exist in FlinSafe but will now be on a view of **InActive Equipment**.

5b. Reactivating a Plant Record

To reactivate a plant item, change the view to **Inactive** Equipment in the Plant Entity, open the record in FlinSafe and click on **Activate** in the ribbon bar adjacent the Save & Close button (see **Figure 17** below).

(Figure 17: Re-activating a plant record)

The plant record can be closed and will not appear on the 'Inactive' view any more. The record will exist in FlinSafe but will now be on a view of **Active Equipment** and will be on the Plant Register again.