

# Creating Actions – on Equipment

To create an action in the system, select the equipment that has been actioned then select “Record Action” in the Tasks section.

Then click on “All Action Types”

This will open a new screen as shown below

Equipment Details							
64%	Customer QA Customer	Serial Number ReplacementSys	Additional Unit Number	Last Inspection Date 24/Mar/2022	Meter Reading (SMU/Hour/Meter) 550	Make CATERPILLAR	Family Dozer -Elevated Sprocket
	Job Site QA Jobsite	Unit Number System		Next Inspection Date 06/May/2022	Life to Date (LTD) 550	Model D10	Setup Date 01/Mar/2022

Date of Action \*    Date of Action \*    SMU/Hourmeter of Equip. at Action Date\*     Replace Full UndercarriageSelect Side \*    Select Side    WO #    Work Order     Activate WO# against Components

Enter the Date of the Action and the SMU of the Equipment when it occurred.

Please be aware that there are validations in the system and if you are unsure of the SMU – navigate the Inspection History or Action History Tab on the details screen to see what Dates and SMU’s have already been recorded for this equipment.

Equipment Details - In Use

64%

Customer  
**QA Customer**

Job Site  
**QA Jobsite**

Serial Number  
**ReplacementSys**

Unit Number  
**System**

Tasks

Record Action

Change Jobsite

Update Meter

Change Meter Unit

Setup Undercarriage

Setup Equipment

OVERVIEW **INSPECTION HISTORY** ACTION HISTORY

Action Type  Side  Component Type

Action Date	Hourmeter SMU <span style="font-size: 10px;">▲</span>	LTD	L/H Chain CMU	R/H Chain CMU	Side	Pos
24/Mar/2022	0	0				
24/Mar/2022	0	0				

You will then need to tick “Replace Full Undercarriage” if all components on either the Left or the Right or Both have been replaced. Or leave this blank if any other change has been made.

Select the Side where the action has occurred – Left, Right or Both.

Work Order – this is an optional field and please tick if you would like to add the work order which can then be add to all components (Enter this in the top field) or individual components (enter against the component)

Work Order  
: **WO 1234**  **Activate WO# against Components**

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Repair or Replace Action Details

	Worn %	Budget Life	CMU	Cost	WO #
▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WO 1234
▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WO 1234

In the example below – I have selected the Left Side only

The screen shows me the details of the Existing Components (Currently Installed) on the Left Hand Side

Currently Installed Details

Left Side - Chain

Component	Pos	Brand	CMU	Worn (%)
Link (Standard)		CATERPILLAR	550	64%
Bushing (Sealed & Lubricated)		CATERPILLAR	550	54%
Shoe (Extreme Service) : Size -...		CATERPILLAR	550	59%

Left Side - Frame

Component	Pos	Brand	CMU	Worn (%)
Idler (Conventional)	Front	CATERPILLAR	550	0%

In the centre – Action Section – I enter the action I would like recorded in the system as shown in the example below

Action Section

Action Selection	Action Type	Available Replacement	Brand
Select Action * Replace	Select Action Type * New	<input type="text" value="New Serial"/> Select Replacement	Select Brand BERCO
Select Action * Repair	Select Action Type	Select Replacement	Select Brand BERCO
Select Action * No Action	<ul style="list-style-type: none"> <li>Turn Pins &amp; Bushings</li> <li>Reseal Only On Bush</li> <li>Repair Component</li> </ul>	Select Replacement	Select Brand BERCO

In the final section Repair or Replace Action Details– you can add any details that are required or useful

Repair or Replace Action Details

Worn %	Budget Life	CMU	Cost	WO #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WO 1234
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WO 1234
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WO 1234

  

Worn %	Budget Life	CMU	Cost	WO #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WO 1234
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WO 1234

Once you have recorded any actions that are required scroll to the bottom left of the screen and click on Save/Update



Your actions will then flow through to the Action History Tab on the Equipment Details Screen and the actions will be reflected on the components on the Equipment.