# Purpose

This procedure outlines the various ways you can load equipment into NAXT.

**What is covered in this guide**

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# Terminology

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| **Make** | The manufacturer of the equipment e.g. Caterpillar |
| **Model** | The model of the equipment |
| **Equipment number** | The system generated identifying number for the equipment |
| **Serial number** | The identifying number on the piece of equipment |
| **Customer equipment number** | The identifying number the customer uses |
| **Plate** | The registration number |
| **Create equipment workflow** | The process that needs to be completed when adding a piece of equipment into the system |
|  | Creates a new service call |
|  | Pushes the equipment workflow on to the approver |
|  | Lists all workflows assigned to me |
|  | Creates the equipment using the details provided during the workflow process |

# Use of icons

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|  | **Business rule** |  | **Key point / Tips** |  | **Information** |

1. Load equipment during service call creation

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| 1. This happens in SOP **SER\_1.2\_Create a Service Call** as part of **Task 2 Find out if equipment is in NAXT** |

1. Load equipment within a segment

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| 1. This happens in SOP **SER\_1.5\_Complete a service call** as part of **Task 16 Change equipment** |

1. Add/Change equipment detail

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| 1. On the Intranet, navigate to:   **Forms > Online forms > Service Forms > NAXT Equipment Update**  The **NAXT Equipment Update** page will display |
| 1. Select one of the following online forms under the service menu  * NAXT Equipment update * GMH NAXT equipment update |
| 1. Complete at least one of the **Equipment identifiers** |
| 1. Complete as many fields in the **Changes / Additions** section as necessary |
| 1. **Submit** the form |

1. Approve equipment workflow: Equipment gate keeper only

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| 1. On your Home screen, highlight the new equipment request 2. Select **Actions > Accept**   The **Create Equipment Workflow – Accept** window will display |
| 1. Add any comments as required 2. Select **Accept**   SNAGHTML5581ef1 |
| 1. Navigate to:   **GGNZ > Home > Area page > Common > Work items > Work items assigned to me**  The **Work items assigned to me** list page will display |
| 1. Double click on the equipment request work item   The **Create equipment workflow** window will display with the details of the equipment request  SNAGHTML55abc58 |
| 1. Select **Create equipment**   The **Create equipment** window will display with the information populated in the form from the equipment request  SNAGHTML55bfb89 |
| 1. Complete any additional known information 2. Select **OK**   The **Create equipment workflow** window will display with the new **Equipment** number added |
| 1. Select **Actions > Complete**   A comment window will display  SNAGHTML560ded5 |
| 1. Add any additional comments 2. Select **Complete** |
| 1. Select **Close** |
| In the segment that the request was sent from, the **Equipment** field will now have the new Equipment number in it  SNAGHTML564a484 |
| 1. Open the newly created equipment and add further detail from workflow or from form submitted in (Task 3) including the following fields:    1. In the **Technical information** fast tab       1. **Related serial number**       2. **Related equipment manufacturer**       3. **Cab type**       4. **All Forklift specific fields**    2. In **Usage information** fast tab       1. **Estimated period usage** If known       2. **Number of periods** Enter ‘1’       3. **Period type** Select ‘Day’ |
| 1. Under the General Tab you will need to change the Agreement Status: From Available to Sold |
| If CAT equipment, add all detail available from SIMSi |