

# Thorough Examination

Set-Up and Engineer App Walk Through

## 1. Set-up

Once the new Thorough Examination templates have been imported into your Protean system there will be some fields that show on the report(s) that will need to be populated within the front-end system.

### 1. Status of Issuer – Employee attribute

When viewing the Certificate under the engineers name will show the Status of Issuer. This field is controlled by an employee attribute linked to the engineer's employee record.

The screenshot shows a software window titled "Employee - Chris Morgan" with several tabs: General, Login, Engineer, Attributes, Purchasing, Messaging, and Other. The "Attributes" tab is active, displaying a list of attributes with their values. The "Status of Issuer" attribute is highlighted with a right-pointing arrow and has the value "Certified". Other attributes include "Loler certified" (Yes), "BTEC" (Yes), "NVQ" (Yes), and "Driving Licence" (Yes). At the bottom, there is a "Modify:" label and a text box containing "Certified" with a dropdown arrow.

Attribute	Value
Loler certified.....	Yes
BTEC.....	Yes
Status of Issuer.....	Certified
NVQ.....	Yes
Driving Licence.....	Yes

### 2. CFTS Member Number – Customer Attribute

Your CFTS Member Number will need to be entered into the DEPOT1 account on the Protean system within the customer attributes. If you are a multi depot company, each member number will need to be linked to the relevant depot account.

The screenshot shows a software window titled "Customer - Protean Main Office" with tabs: General, Accounts, Sales, Attributes, Other, and Memo. The "Attributes" tab is active, displaying a list of attributes. The "CFTS Member No." attribute is highlighted with a right-pointing arrow and has the value "CFTS-6674". At the bottom, there is a "Modify:" label and a text box containing "CFTS-6674" with a dropdown arrow.

Attribute	Value
CFTS Member No.....	CFTS-6674

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### 3. Safe working load / Attachment SWLKG – Equipment Attribute

The Safe working load information is stored within the equipment record for that specific machine.

The screenshot shows the 'Attributes' tab for 'Equipment - 7 - Mitsubishi/FG15 - 5556648'. The 'Category' is set to 'Thorough Examination'. The following table shows the attribute values:

Attribute	Value
SWLKG.....	1000
LCMM.....	
AttachmentSWLKG.....	1000
AttachmentLCMM.....	
Year Of Manufacture.....	2015

At the bottom, there is a 'Modify:' field with the value '1000' and a dropdown arrow.

### 4. Lifting capacity (MM) / Attachment LCMM – Equipment attribute

The lifting capacity information is stored within the equipment record for that specific machine.

The screenshot shows the 'Attributes' tab for 'Equipment - 7 - Mitsubishi/FG15 - 5556648'. The 'Category' is set to 'Thorough Examination'. The following table shows the attribute values:

Attribute	Value
SWLKG.....	1000
LCMM.....	15
AttachmentSWLKG.....	1000
AttachmentLCMM.....	30
Year Of Manufacture.....	2015

At the bottom, there is a 'Modify:' field with the value '1000' and a dropdown arrow.

# Thorough Examination

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### 5. Year of Manufacture – Equipment Attribute

The Year of Manufacture will display on the certificate as well as the report of thorough examination and can be added via the equipment attribute screen.

Equipment - 7 - Mitsubishi/FG15 - 5556648

General Attributes Attachments Financial Servicing Other Memo

Category: Thorough Examination

SWLKG.....	1000
LCMM.....	15
AttachmentSWLKG.....	1000
AttachmentLCMM.....	30
▶ Year Of Manufacture.....	2015

Modify: 2015

### 6. Record Number – CFTS Member number + Protean unique inspection number

### 7. Fleet number – Customer Equipment number (Equipment record)

### 8. Hours – Job Meter reading

Can be found on the equipment record (bottom left) or on the job visit screen.

Equipment - 8 - Caterpillar/V110 - v100-221

General Attributes Attachments Financial Servicing Other Memo

Equipment		Location	
No.:	8	Depot:	Limerick
Make:	Caterpillar	Site:	FORKLIFT
Model:	V110	The Forklift Company Chain Ave Tyre Line Fork City County Lift LI17 BIG	
Serial No.:	v100-221	Location:	
Status:	Customers Own	In Transit:	<input type="checkbox"/>
Second Hand:	<input type="checkbox"/>		
Asset:	<input type="checkbox"/>		
Hire Rate:	£0.00		


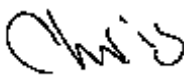




Contact		Workshop	
Name:		In Workshop:	<input type="checkbox"/>
Tel:		Condition:	<input checked="" type="checkbox"/> Inspected

References		Meter	
Customer's Equipment No.:	211	Reading:	2000000
Category 1:		Date Read:	20/09/2017
Category 2:			
Reference 3:			
Reference 4:			

# Thorough Examination

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REPORT EXAMPLE

Thorough Examination Certificate			 Consolidated Fork Truck Services	
This certificate has been issued according to the conditions and notes on the next page.				
<b>NOTE: If you have doubts as to whether this certificate is valid please contact CFTS as indicated on the next page.</b>				
Make	Hour Reading			
Caterpillar	8	10000		
Model	Fleet Number			
ECO KD 250	7	Truck 85		
Serial No	Date of Manufacture			
CATECO-SN675	5	2015		
Expiry Date	Issue Date	Record Number		
30/09/18	20/09/2017	6	CFTS-8674/503	
Please note that this certificate relates to the Report of Thorough Examination with the above record number. The expiry date is the date on which the report expires, and the date by which the next report is required. The issue date is the date on which that Report of Thorough Examination was issued, not this certificate.				
Issuer's Name in CAPITALS		Signature of Issuer		
CHRIS MORGAN				
Status of Issuer	CFTS Member Number			
1 CERTIFIED	2 CFTS-8674			
<b>Warning:</b> A certificate is not evidence that the equipment is in satisfactory condition. Check carefully that the above details are correct. Do not accept a certificate which has been altered.		Name and Address of Issuing Company		
		PROTEAN SOFTWARE LIMITED 1130-1140 Elliott Court Herald Avenue Coventry CV5 6UB 		
 BITA Lifting Industry Standards				

# Thorough Examination

Set-Up and Engineer App Walk Through

## REPORT OF THOROUGH EXAMINATION IN ACCORDANCE WITH GN28

Only to be used by a competent person



Name and address of employer (user) for whom this examination is made:		The Forklift Company Chain Ave Tyre Line Fork City County Lit LI17 BIG			
Location or address examined at:	The Forklift Company Chain Ave Tyre Line Fork City County Lit LI17 BIG		Record No:	CFTS-8874/507	
			Examination Date:	20/09/2017	
			Equip No:	8	
			Cust Equip No:	211	
		Serial No:	v100-221		
Make/Model:	Caterpillar/V110	Description:	Truck		
Safe Working Load: (SWL)	Kg 1500KG at 1500MM mm	SWL With Attachments:	Kg 250KG at 450MM mm		
Date of Manufacture:	2015	Hours:	1000000		
Attachment:	5	Reason for Thorough Examination:	In service - with an interval of 12 months		
Comments:					
General comments					
DEFECTS : Indication of any parts found to have a defect which is or could become a danger to persons and a description to the defect and particulars of any repair, renewal or alteration required to remedy a defect found to be a danger to persons. (Actions to take).					
Description of Defect			Timescale for repair, renewal or alteration (if immediate state NOW)		
Measurements And Other Examinations:					
Chain elongation (1)	Chain elongation (2)	Chain elongation (3)	Chain elongation (4)	Forks	Date of previous examination
Dimension	Wear %	Dimension	Wear %	Dimension	Wear %
					02/09/2016
					or hours: 47000
Other Tests performed / Comments					Latest date for next examination
					2018
					or hours: 30000
DECLARATION BY COMPETENT PERSON					
I hereby declare that the equipment described in this report was thoroughly examined in accordance with GN28 and :-					
<input checked="" type="checkbox"/>	No faults have been detected.				
<input type="checkbox"/>	Faults have been detected and the above actions are required within the time limits specified.				
<input type="checkbox"/>	The equipment must not be used until the above recommendations are carried out.				
Name and address of CFTS Accredited Company responsible for this Thorough Examination :-			Authorised Examiner:		
PROTEAN SOFTWARE LIMITED			Name: Chris Morgan		
1130-1140 Elliott Court			Signature:		
Herald Avenue					
Coventry					
CV5 6UB					

Report in accordance with Schedule 1 to LOLER 98  
Format approved by CFTS in accordance with GN28 Safety Inspection of Industrial Lift Trucks  
Consolidated Forklift Truck Services Ltd. is a company jointly owned by British Industrial Truck Association Ltd. and The Fork Lift Truck Association Ltd.

# Thorough Examination

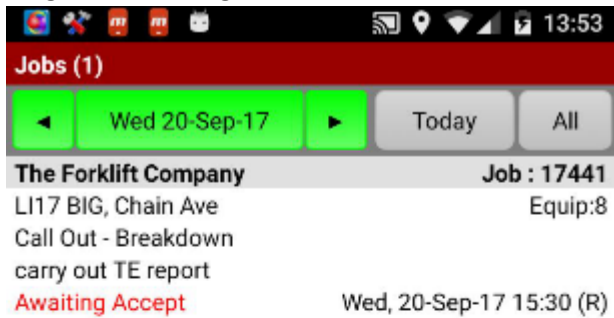
Set-Up and Engineer App Walk Through

## 2. Engineer App – Completing a Thorough Exam

Now the set-up has taken place we can send an inspection to our engineer and get them to fill out a full report all from the app.

Once we have created a job within the front end of Protean and have assigned that to an engineer, when the app refreshes the job will automatically be downloaded and will then be available for the engineer to work on.

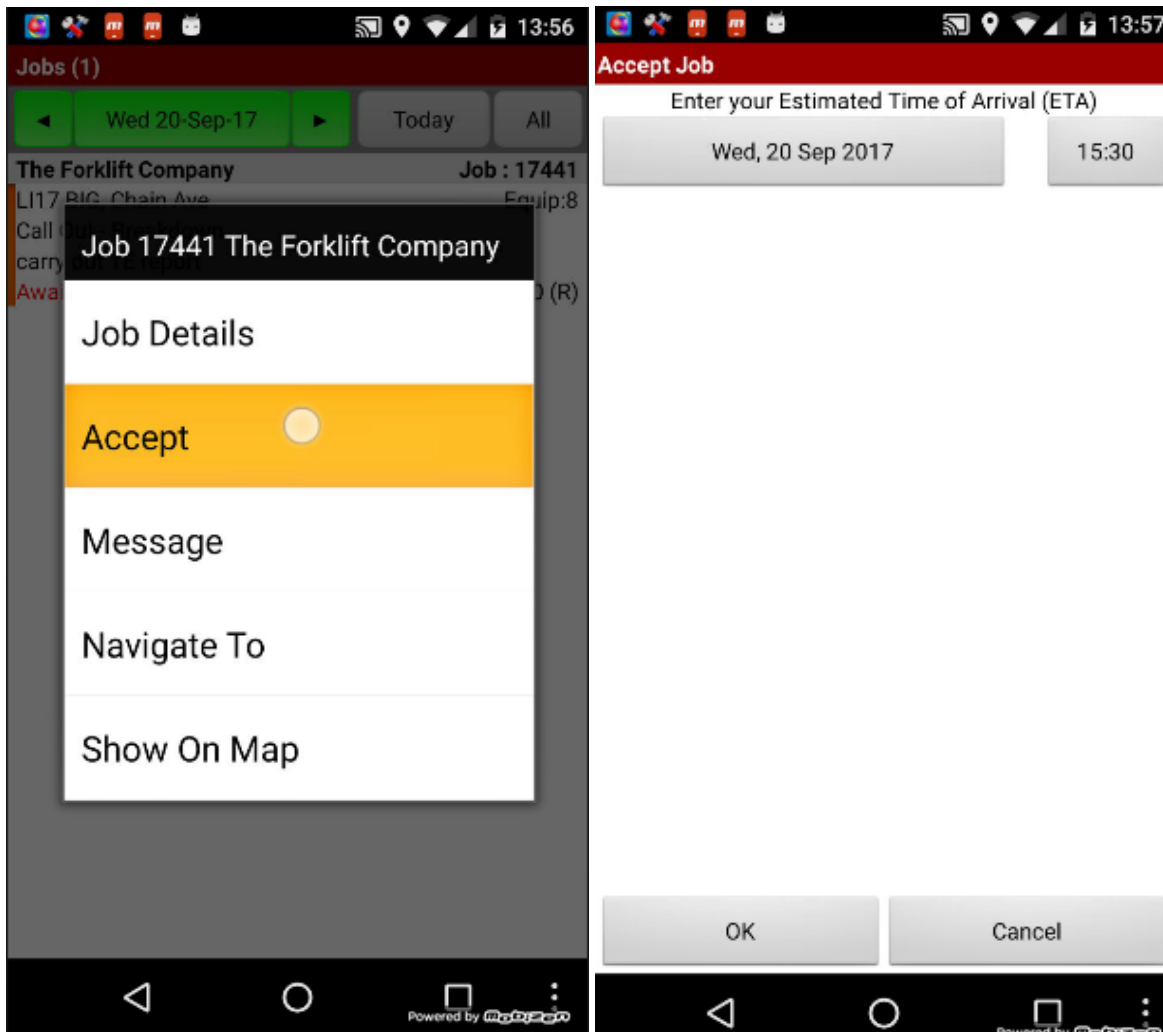
1. Accepting the job – when the job is downloaded it will appear on the mobile app on the selected day the job was assigned to the engineer for.



The engineer will then be asked to accept the work and give the office an ETA (estimated Time of Arrival).

# Thorough Examination

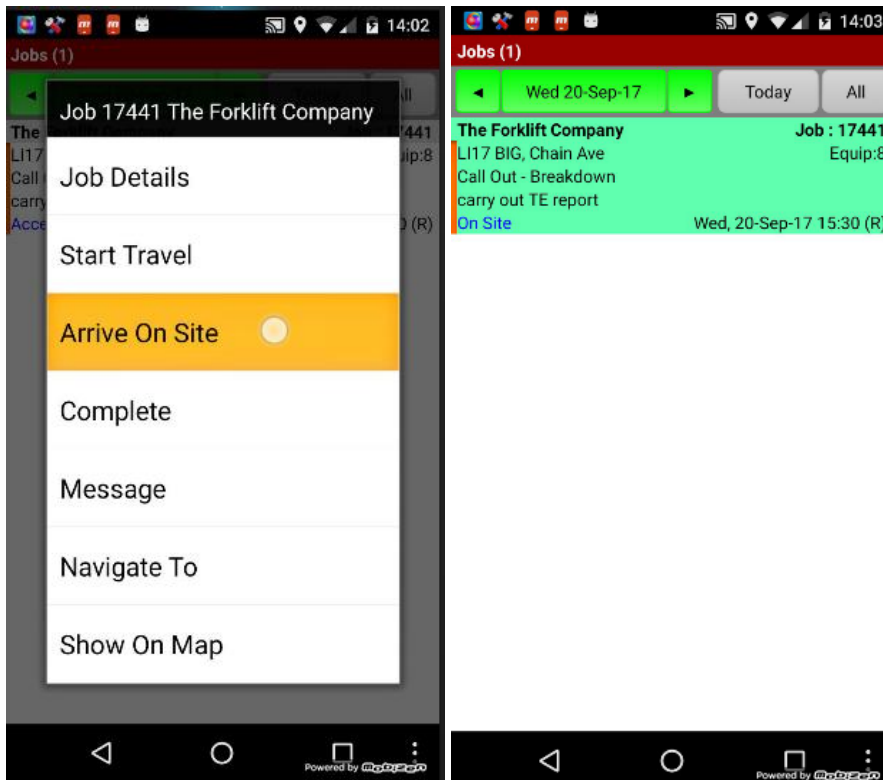
Set-Up and Engineer App Walk Through



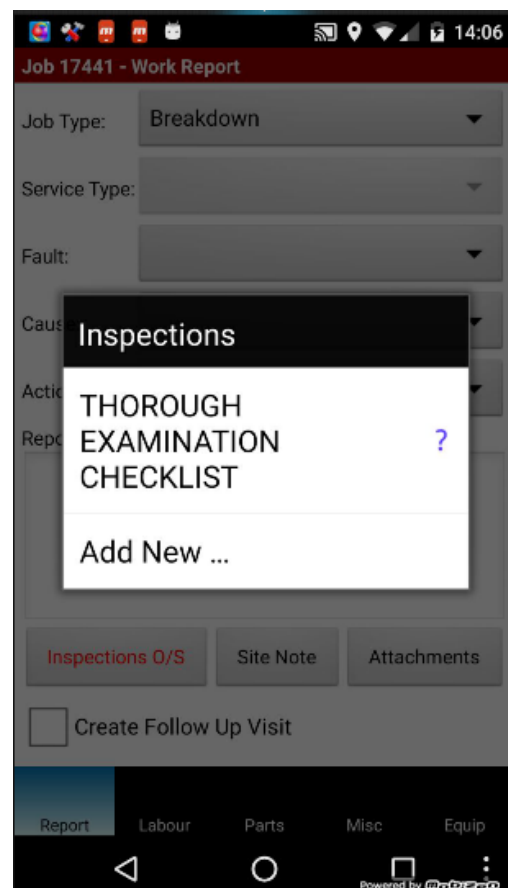
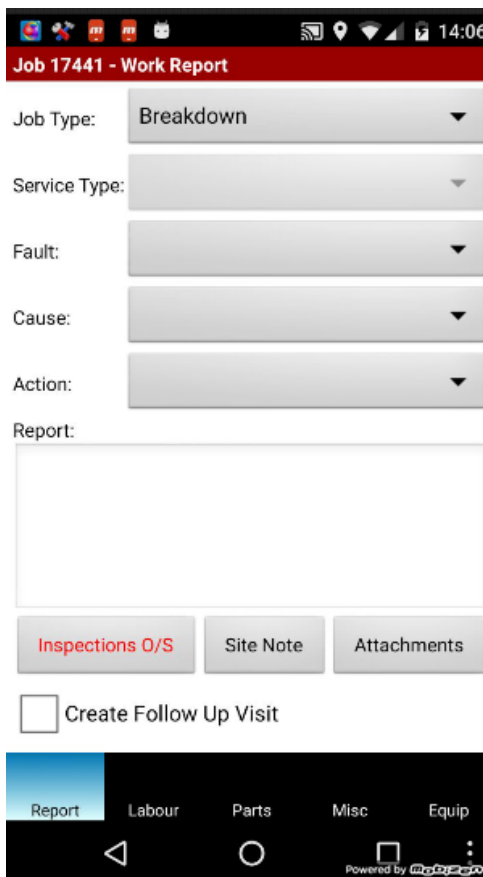
2. Once the job has been accepted the engineer has the option to Start Travel, Arrive on Site or Complete. With this walkthrough we will skip the travel and arrive on site.

# Thorough Examination

Set-Up and Engineer App Walk Through



- Now that we are marked as On site, we can click into our complete option and will be brought into the job sheet. From here we can amend the job type, enter the engineers Report and any inspections that need to be filled in will display in the inspections area, currently highlighted in Red if outstanding.

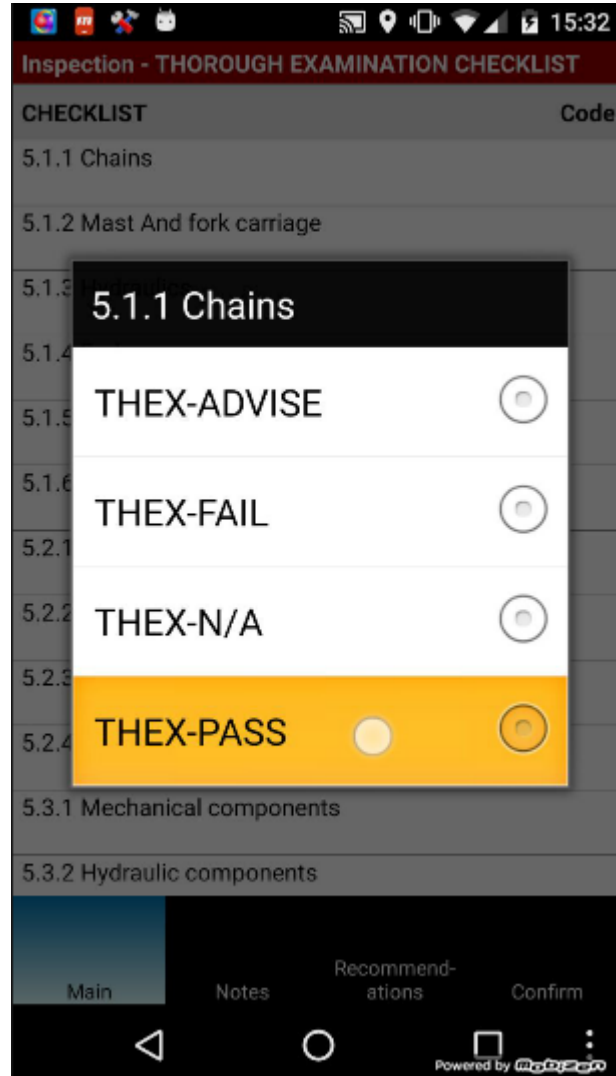
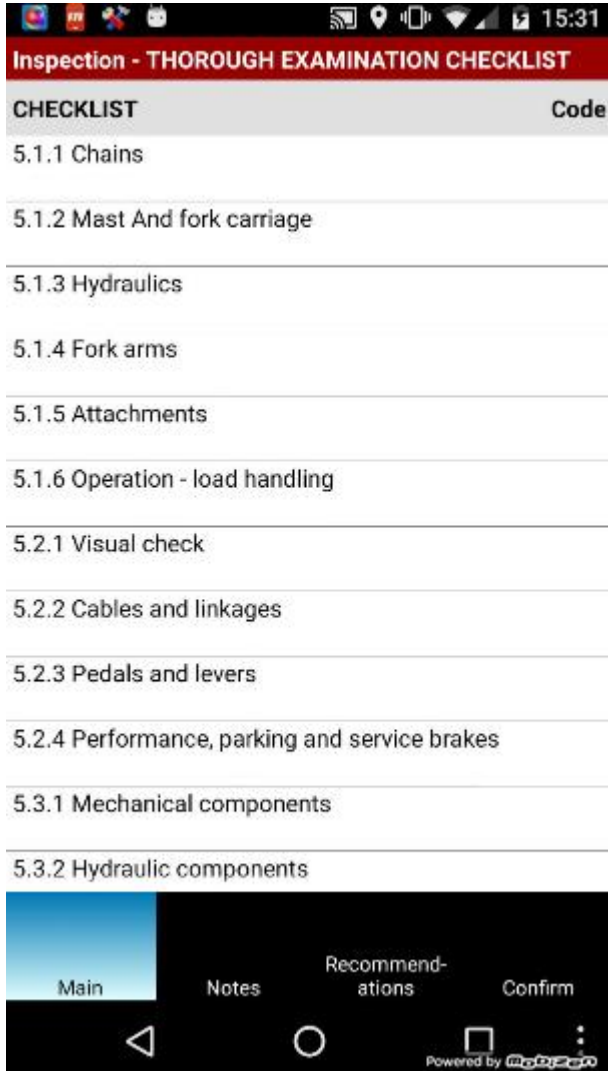




# Thorough Examination

## Set-Up and Engineer App Walk Through

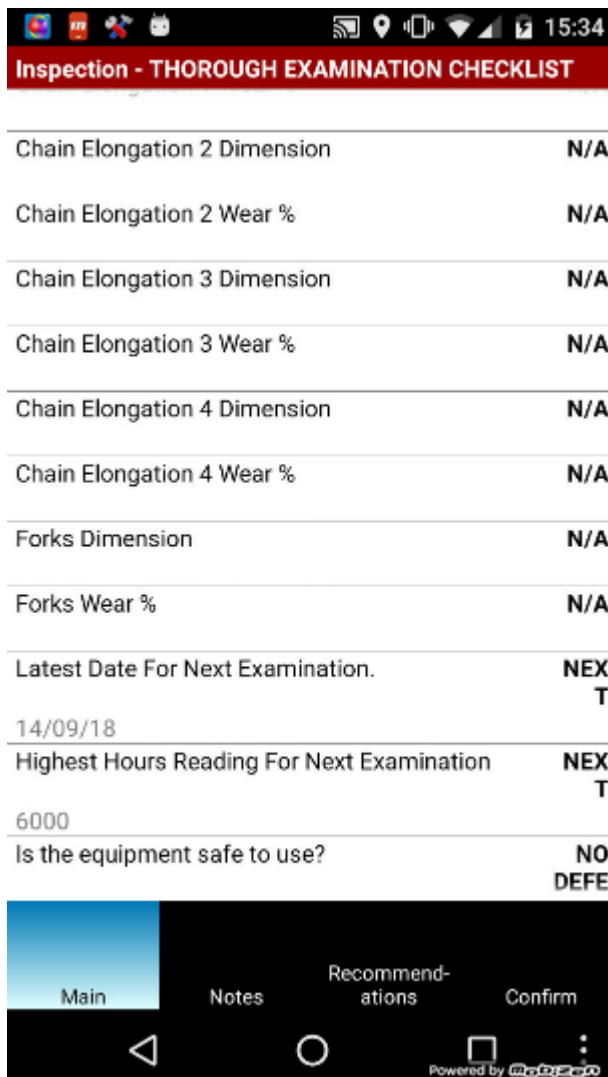
- Click into the Inspection in this case the THOROUGH EXAMINATION CHECKLIST and you will be shown the list of questions. When the engineer is ready to start the inspection they will click on the first question and as they answer each one the system will pop up with the next question in the list saving the engineer having to click on individual questions.



# Thorough Examination

## Set-Up and Engineer App Walk Through

- Once the report has been complete, the engineer will click into the confirm tab and hit the complete option. This will bring the engineer back to the job screen ready for them to enter the Report, Time on / off and any parts listed.



- Now the job has been completed by the engineer, the report and examination comes back to those in the office ready for review and issuing the certificate.  
To locate the job you can search Protean for the job number or find it whilst looking at the engineers plannerboard.
- Now that we have found the job, to generate the inspection report you must be in the Main Tab and looking in the reference heading. The right hand side will have an option for inspection along with the inspection number. Click on the [...] icon to open.

# Thorough Examination

## Set-Up and Engineer App Walk Through

Job - 17441

Equipment	Site	Customer	Job
8 Caterpillar V110 SN: v100-221 Customers Own	FORKLIFT The Forklift Company Chain Ave Tyre Line Fork City County Lift LI17 BIG	FORKLIFT The Forklift Company Chain Ave Tyre Line Fork City County Lift LI17 BIG	Contact Name: [ ] No: 17441 Charge Contact Phone: [ ] Type: Breakdown Contact Email: [ ] Order No: [ ] Priority: Low Authority: [ ] Status: Awaiting Complete

Main Labour Parts Misc Attributes Invoicing Summary

To Do: carry out TE report

Reference: Depot: Limerick, Entered By: Jermain Defoe, Logged: 20/09/2017 13:49, Due: 20/09/2017 12:20, Instructed: 20/09/2017 13:53, Complete: [ ], Invoiced: [ ], Invoice No: [ ], Completed By: [ ], Sales Rep: [ ], Booked by: [ ], Reference 2: [ ], Transport: No, Attachments: No, Credited: No

8. You will then be brought into the inspection sheet and be able to see the answers your engineer has given. From this window you can see in the top right hand corner who the engineer was, the date and the visit number. To view the document and certificate click on the reports icon highlighted below.

Inspection - 520

Notes	Recommendations	Inspection
		No: 520 PASS Type: ROUGH EXAMINATION CHECK Job/Visit No: 17441 1 Visit Date: 20/09/2017 Engineer: Chris Morgan Reason Not Done: [ ] Status: Completed

Results Other

Category	Attribute	Code	Notes	Req
CHECKLIST	Chains	PASS		
CHECKLIST	Mast And fork carriage	PASS		
CHECKLIST	Hydraulics	PASS		
CHECKLIST	Fork arms	PASS		
CHECKLIST	Attachments	PASS		
CHECKLIST	Operation - load handling	PASS		
CHECKLIST	Visual check	PASS		
CHECKLIST	Cables and linkages	PASS		
CHECKLIST	Pedals and levers	PASS		
CHECKLIST	Performance, parking and service brakes	PASS		
CHECKLIST	Mechanical components	PASS		
CHECKLIST	Hydraulic components	PASS		
CHECKLIST	Operation - mechanical systems	PASS		
CHECKLIST	Prime mover and transmission	PASS		
CHECKLIST	Controls, cables and linkages	PASS		
CHECKLIST	THEX-PASS			

Auto-Fill Outstanding Skipped Complete Uncomplete Close

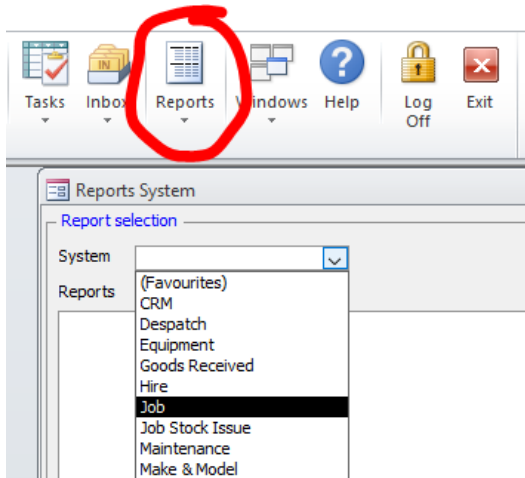
9. Below will be an example of a THOROUGH EXAMINATION REPORT including the two page Certificate\*. We hope this guide has given you a bit more of an insight into how the Protean App ties into the examination reports.

\*If report has been passed by the engineer

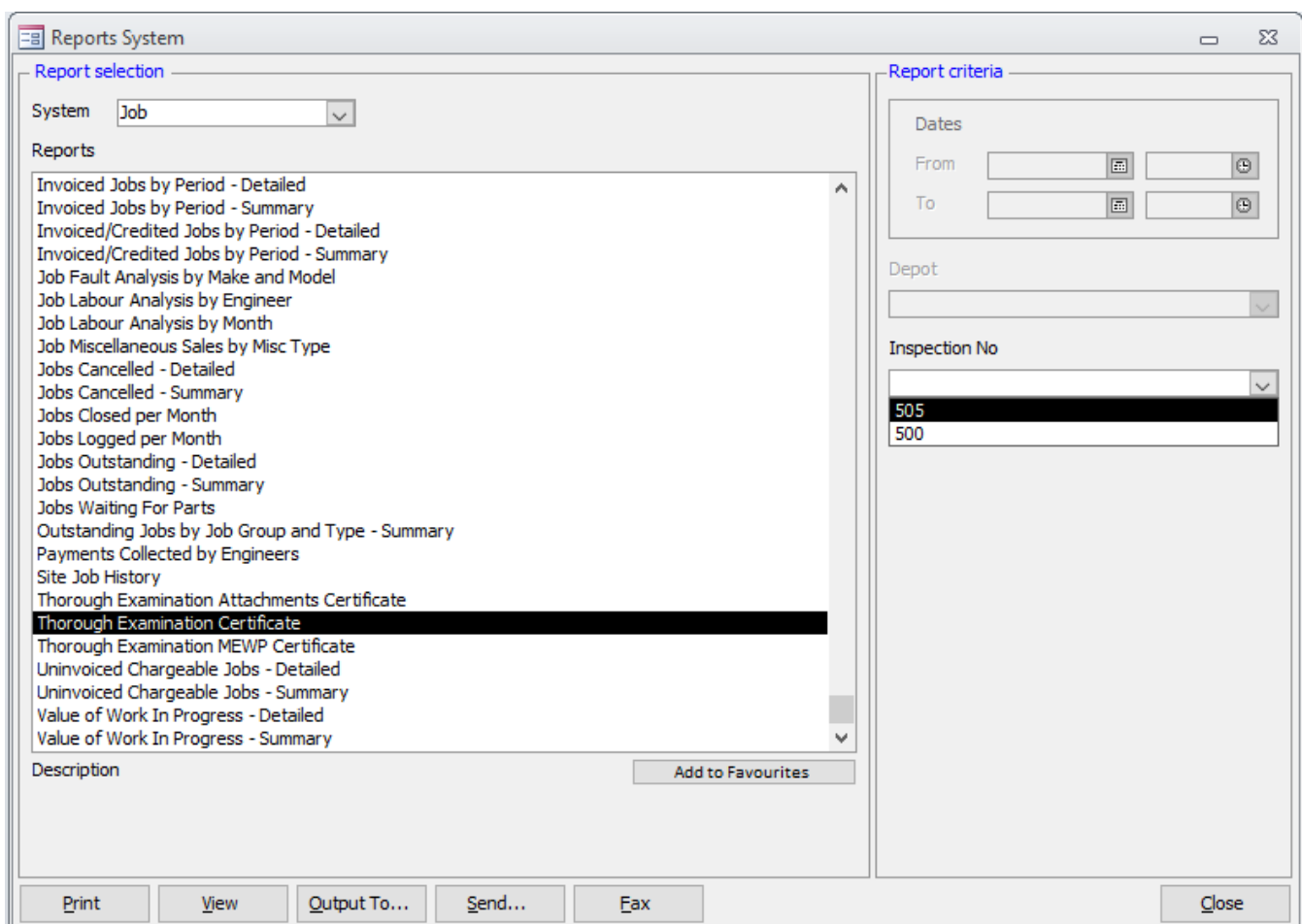
# Thorough Examination

## Set-Up and Engineer App Walk Through

10. If the engineer hasn't passed the Thorough Examination first time around and the client comes back to you confirming the work needed in order to pass the examination has been carried out office users will need to go into the Reports Module > select Job in the system drop down.



11. The user can then scroll down the list of default reports and locate the Thorough Examination Certificate, Thorough Examination Attachments Certificate or Thorough Examination MEWP Certificate option. Search for the Protean Inspection Number within the relevant report you are looking for and the Certificate page will then be generated without reissuing the original inspection document. i.e. in the example below just pages 3 and 4 would be issued.



# Thorough Examination

Set-Up and Engineer App Walk Through

## REPORT OF THOROUGH EXAMINATION IN ACCORDANCE WITH GN28

Only to be used by a competent person



Name and address of employer (user) for whom this examination is made:		The Forklift Company Chain Ave Tyre Line Fork City County Lift LI17 BIG									
Location or address examined at:		The Forklift Company Chain Ave Tyre Line Fork City County Lift LI17 BIG									
Record No:		CFTS-8874/520									
Examination Date:		20/09/2017									
Equip No:		8									
Cust Equip No:		211									
Serial No:		v100-221									
Make/Model:		Description:									
Caterpillar/V110		Truck									
Safe Working Load: (SWL)		SWL With Attachments:									
Kg 1500KG at 1500MM mm		Kg 250KG at 450MM mm									
Date of Manufacture:	Hours:	Reason for Thorough Examination:									
2015	5000	In service - with an interval of 12 months									
Attachments:		Mast Configuration:									
Comments:											
DEFECTS : Indication of any parts found to have a defect which is or could become a danger to persons and a description to the defect and particulars of any repair, renewal or alteration required to remedy a defect found to be a danger to persons. (Actions to take).											
Description of Defect		Timescale for repair, renewal or alteration (if immediate state NOW)									
Measurements And Other Examinations:											
Chain elongation (1)		Chain elongation (2)		Chain elongation (3)		Chain elongation (4)		Forks		Date of previous examination	
Dimension	Wear %	Dimension	Wear %	Dimension	Wear %	Dimension	Wear %	Dimension	Wear %		
Other Tests performed / Comments										Latest date for next examination	
										14/09/18	
										or hours: 6000	
DECLARATION BY COMPETENT PERSON											
I hereby declare that the equipment described in this report was thoroughly examined in accordance with GN28 and :-											
<input checked="" type="checkbox"/> No faults have been detected.											
<input type="checkbox"/> Faults have been detected and the above actions are required within the time limits specified.											
<input type="checkbox"/> The equipment must not be used until the above recommendations are carried out.											
Name and address of CFTS Accredited Company responsible for this Thorough Examination :-						A Authorised Examiner:					
PROTEAN SOFTWARE LIMITED						Name: Chris Morgan					
1130- 1140 Elliott Court						Signature:					
Herald Avenue											
Coventry											
CV5 6UB											

Report in accordance with Schedule 1 to LOLER 98  
Format approved by CFTS in accordance with GN28 Safety Inspection of Industrial Lift Trucks  
Consolidated Forklift Truck Services Ltd. is a company jointly owned by British Industrial Truck Association Ltd. and The Fork Lift Truck Association Ltd.

# Thorough Examination

Set-Up and Engineer App Walk Through

## CHECK LIST FOR THOROUGH EXAMINATION



Make/Model:  
Caterpillar/V110

Date of Examination: 20/09/2017  
Record No: CFTS-8674/520

No.	Section	Item	Ref.	Detail of test	Additional comments if Appropriate
1	Load Handling	Chains	5.1.1	PASS	
		Mast & fork carriage	5.1.2	PASS	
		Hydraulics	5.1.3	PASS	
		Fork arms	5.1.4	PASS	
		Attachments	5.1.5	PASS	
		Operation	5.1.6	PASS	
2	Braking	Visual check	5.2.1	PASS	
		Cables and linkages	5.2.2	PASS	
		Pedals and levers	5.2.3	PASS	
		Performance, parking & service brakes	5.2.4	PASS	
3	Steering	Mechanical components	5.3.1	PASS	
		Hydraulic components	5.3.2	PASS	
		Operation - mechanical systems	5.3.3	PASS	
4	Traction I.C/Electric	Prime mover & transmission	5.4.1	PASS	
		Controls, cables & linkages	5.4.2	PASS	
		Exhaust system & emissions	5.4.3	PASS	
		Battery & cables	5.4.4	PASS	
		Tyres	5.4.5	PASS	
		Wheels	5.4.6	PASS	
		Operation	5.4.7	PASS	
5	Safety systems	Operation of visual & audible warnings	5.5.1	ADVISE	Very dirty advised to keep clean
		Operation of interlocks	5.5.2	PASS	
		Electrical circuits	5.5.3	PASS	
		Security & mounting of capacity & data plates	5.5.4	PASS	
		Security & mounting of control function markings	5.5.5	PASS	
		Lighting, wipers & mirrors	5.5.6	PASS	
		Wire guidance systems & aisle interlocks	5.5.7	PASS	
6	Structure	Chassis	5.6.1	PASS	
		Overhead guard	5.6.2	PASS	
		Load backrest extension	5.6.3	PASS	
		Security of all fastenings	5.6.4	PASS	
		Seating / platform	5.6.5	PASS	
7	Access	All Protection	5.7	PASS	

Additional information

Format approved by CFTS in accordance with GN28 Safety Inspection of Industrial Lift Trucks  
Consolidated Forklift Truck Services Ltd. is a company jointly owned by British Industrial Truck Association Ltd. and The Fork Lift Truck Association Ltd.

# Thorough Examination

Set-Up and Engineer App Walk Through

## Thorough Examination Certificate



Consolidated Fork Truck Services

This certificate has been issued according to the conditions and notes on the next page.

NOTE: If you have doubts as to whether this certificate is valid please contact CFTS as indicated on the next page.

Make	Caterpillar	Hour Reading	5000
Model	V110	Fleet Number	211
Serial No	v100-221	Date of Manufacture	2015
Expiry Date	14/09/18	Issue Date	20/09/2017
		Record Number	CFTS-8874/520

Please note that this certificate relates to the Report of Thorough Examination with the above record number. The expiry date is the date on which the report expires, and the date by which the next report is required. The issue date is the date on which that Report of Thorough Examination was issued, not this certificate.

Issuer's Name in CAPITALS	CHRIS MORGAN	Signature of Issuer	
Status of Issuer	CERTIFIED	CFTS Member Number	CFTS-8874

### Warning:

A certificate is not evidence that the equipment is in satisfactory condition.

Check carefully that the above details are correct.

Do not accept a certificate which has been altered.

Name and Address of Issuing Company

**PROTEAN SOFTWARE LIMITED**

1130-1140 Elliott Court  
Herald Avenue  
Coventry  
CV5 6UB





# Thorough Examination

Set-Up and Engineer App Walk Through

Consolidated Fork Truck Services Ltd (CFTS) is a trading company owned jointly by the British Industrial Truck Association (BITA) and the Fork Lift Truck Association (FLTA). They have worked together to improve and maintain the standard of Thorough Examinations conducted by their Member companies and others. The provision of this certificate indicates that the Thorough Examination referred to above has been carried out by a company authorised by CFTS.



## NOTES

### About this document

1. This document is a certificate telling you that a Report of Thorough Examination has been carried out on the equipment, the details of which are recorded above. It is the Report of Thorough Examination document that has legal status, not this certificate.
2. A Thorough Examination is not a pass or fail examination like an MOT test. The Competent Person who carries out the examination will have completed the Report of Thorough Examination, the legal document, and passed this to you. That report will carry the same record number as this certificate.
3. The Report of Thorough Examination, and any supporting documentation issued with it, will have advised you if any work was required in order to make the equipment completely safe to use. This certificate will have been issued to indicate that either no work was required or that the faults notified have now been rectified. This is an added service provided by CFTS to help you meet your legal responsibilities.
4. The expiry date shown on the front of this certificate is based on the "Latest Date for Next Examination" shown on the Report of Thorough Examination. This date has been determined by the Competent Person who conducted the Thorough Examination, and is based on the use of the equipment. The maximum interval between Thorough Examinations is 12 months. However in many circumstances (eg when the equipment is being used to lift persons) the interval will be reduced to 6 months. In some instances the interval will be even less. The recommended intervals between Thorough Examinations are given in BITA GN28 and you can request an information sheet if you are unsure. The Employer is responsible for arranging the next due Thorough Examination, which must be carried out before the equipment reaches the expiry date.

### Crime Prevention

5. Only companies that are accredited to the CFTS scheme are entitled to use CFTS documentation. That includes the CFTS Report of Thorough Examination and the CFTS Thorough Examination Certificate. A record is kept of which documents, by record number are issued to each accredited company. The status of a company can be checked on the CFTS website. If you have any concerns about the documents you have received, or any other matter with regard to this Thorough Examination, please contact CFTS direct.

### About Thorough Examinations

6. The Thorough Examination of lifting equipment is a legal requirement under the Lifting Operations and Lifting Equipment Regulations 1998 (LOLER 98). These regulations are not straightforward. The answers to a number of frequently asked questions are provided on the CFTS website.
7. The examination referred to above will have been carried out according to the requirements of the Provision and Use of Work Equipment Regulations 1998 (PUWER 98) for Safety Inspection and LOLER 98 for Thorough Examination. It has been carried out to the standards advised in BITA GN28, a standard endorsed by CFTS and HSE. However, this certificate and the Report of Thorough Examination to which it refers, only confirms that the equipment met the requirements of current legislation. Please remember that a Thorough Examination does not cover the condition of the power unit, transmission or other non-safety related items. It is the responsibility of the owner or user to ensure that the equipment remains in a safe condition at all times.

### Appeals and Equipment Condition

8. CFTS has a formal appeals procedure. If within 28 days of the date of the Thorough Examination you think that a fault should have been reported at the time of the Thorough Examination, and it was not, then you should contact CFTS. If you telephone your call may be monitored or recorded for lawful purposes. It is very important that no repairs or modifications are carried out before any appeal test or inspection is conducted. Any change in the condition of the equipment may affect the outcome of the appeal.

### CFTS Contact Details

9. Full contact details for CFTS are given on the CFTS website at [www.thoroughexamination.org.uk](http://www.thoroughexamination.org.uk)