advanced MOBILE

User Guide

Infor EAM Work Management & Inspections

User Guide – Handheld Edition

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INFOR solution partner

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Introduction

Welcome to the **Infor EAM Work Management & Inspections**. This guide is intended to help you use the Work Management mobile application that is included in the Advanced Mobile for EAM Work Management solution.

Typographical Conventions

Bold type represents on-screen items. For example:

Click the **Build Report** tab.

`Courier` font indicates text to be typed exactly as shown. For example:

Run the following script: `upg550.sql`

Italic type indicates emphasis or variables. For example:

To restrict the row to the product category, type 1100,[*CATEGORY*]

NOTE: *In the above example,* CATEGORY *is a variable.*

Cascaded menu items are **Bold and separated by arrows (>)**. For example:

Select **File > Save**

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Overview

Advanced Mobile for EAM Work Management & Inspections is a comprehensive mobile solution that extends EAM Work Order functionality to the mobile workforce.

The Mobile Work Management application can be deployed on a wide variety of Windows Mobile-powered handheld computing devices to facilitate the creation, receipt, review and modification of EAM Work Order data in the field.

Synchronization of data for this application is handled seamlessly by SOA (Services-Oriented Architecture) services hosted within the Advanced Mobile Integration Engine and by the standard EAM Web Services. As such, the host EAM system can be on-premises or a hosted SaaS (Software as a Service) solution.

The following document provides information on the Work Management mobile application features and usage.

System Requirements

The following components are required to run the Advanced Mobile for EAM Work Management solution:

- Infor EAM 10.0 (or later) Enterprise Edition

Application Version

The **Work Management and Inspections** application comes in three versions: **Work Management**, **Inspections** and **Work Management & Inspections**. Therefore, not all functionality will be in either the **Work Management** or the **Inspections** versions. Only **Work Management & Inspections** will have everything.

Licensing for all of these is handled in the Advanced Mobile Admin Portal.

Getting Started

Starting the Mobile Application

The mobile application installer place applications icon in the **Programs Menu**

☞ To access the mobile application, click the **Windows Start** button

Windows Mobile Start & Programs Menu

☞ Scroll down to the desired **Advanced Mobile icon** and click the application icon once

NOTE: *Icons for newly installed apps are at the bottom of the list.*

☞ The Work Management & Inspections splash screen should appear

Work Management & Inspections Splash Screen

☞ If it does not appear, please refer to the **Troubleshooting** section of this document on page **68**

Application Loading

☞ The **Application Loading Screen** runs after a device reboot

Application Loading Screen

User Login

☞ Use the same credentials to log into the application as used for **Infor EAM**

Work Management Login Screen

NOTES: *The credentials are authenticated against Infor EAM, therefore, the device must be connected to the network the first time a user logs into the device in order to authenticate user credentials.*

Successfully authenticated credentials will be securely stored on the device for use in authentication when an active network connection is not available.

Any time a user's credentials change in EAM, the device must be connected to the network in order to authenticate the user-account and store the updated credentials on the device.

Failure to do so will result in the rejection of all submitted transactions.

☞ A successful login will allow you to view the work orders for that user – proceed to the **Basic Work Management Application** section on page **12**

Login Failure

☞ If you see the following **Login Failure** screen, try to log in again or contact your system administrator

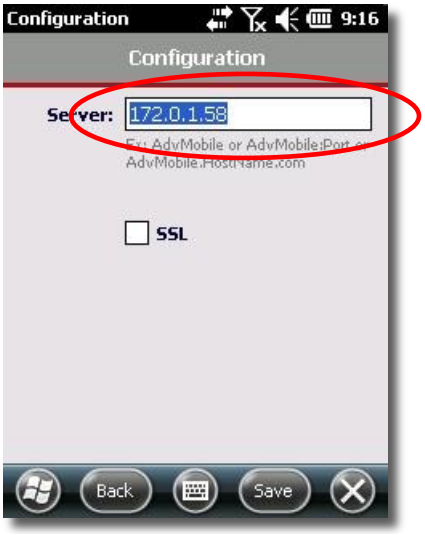
Work Management User Login Failure

Configuration

- If your device does not connect automatically to the Work Management server, click on the **Menu** button

Login Screen Main Menu

- From the main menu, select **Configuration**
- Ensure that there is a web service value in the **Server** field



Work Management User Login Failure

- If there is no value in the **Server** field, contact your System Administrator for the appropriate server name and whether or not to use the **SSL** checkbox
- If there is a value, check that the device has connectivity to the network
- If you have connectivity, contact your System Administrator for the appropriate server name and whether or not to use the **SSL** checkbox

Basic Work Management Application Functionality

Initializing/Re-Initializing the Database

- Upon logging in the very first time, the **Work Order Summary** screen may be empty

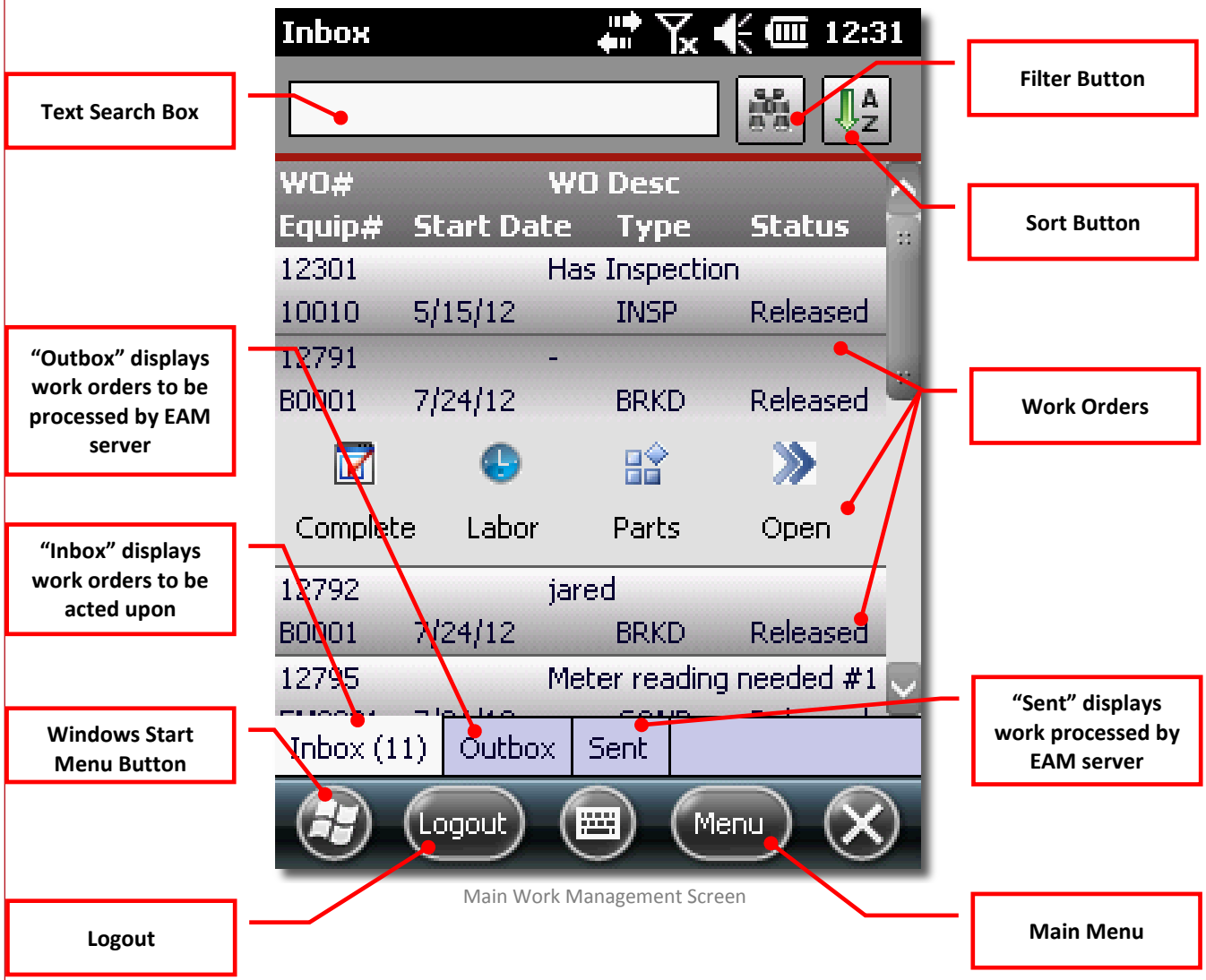
Empty DB Requiring Initialization

- This is an indication that it may be necessary to synchronize or re-initialize the device's local database

NOTE: *Please see section* ***Synchronization / Re-Initialization*** *on page* ***65*** *for details.*

Main Screen

☞ Once you have been successfully authenticated, the Inbox tab will be displayed and any pending work orders listed



Main Work Management Screen

Logging Out

☞ The **Logout** button allows you to log out of the Work Management application and return to the **Workflow Login Screen**

Text Box Search/Filtering

- The **Text Box** acts as a search function allowing you to limit the records displayed
- **WO#** (work order numbers) and **Equip#** (equipment numbers) are the fields searched when text is entered into the Text Box

Text Box Default Search

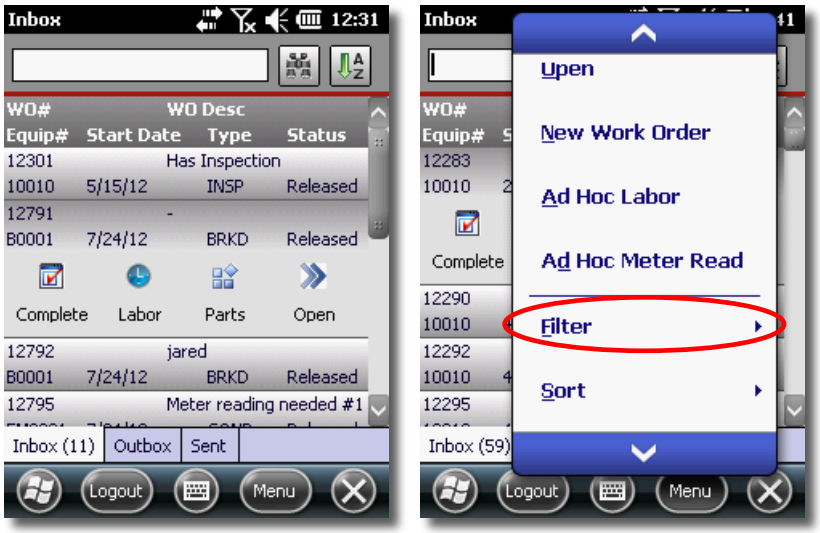
- In the example above, no text in the **Text Box** displays all available work orders
- Typing in the characters '12' would filter out a subset of records that do not have 12 in the ID
- Typing in a full ID will eliminate all records except one
- To display all records again, simply delete the characters from the **Text Box**

Scanning Equipment IDs

- For handheld units equipped with barcode scanners, you can scan the **Equipment ID** directly into the device to search existing work orders

Pre-Defined Search/Filters

☞ To search for or filter the list of work orders based on pre-defined criteria, click the **Menu** button at the bottom of the screen



Main Menu Button

☞ Scroll down on the main menu to the **Filter** option

☞ Select the desired **Filter**

Search Options

☞ The list will be filtered to display only those work orders that are associated to that selection (in the above screens, the number of work orders listed went from nine (9) to four (4)

You have six options:

- **Assigned –** Lists only work orders assigned to the logged in user-account
- **Scheduled –** Lists only work orders scheduled for the logged in user-account
- **My Dept –** Lists only Work orders in your department
- **Due Today –** Lists only Work orders with a scheduled Start Date of today
- **Overdue –** Lists only Work orders with a scheduled Start Date prior to today
- **All –** Clears any existing pre-defined filter to display all items

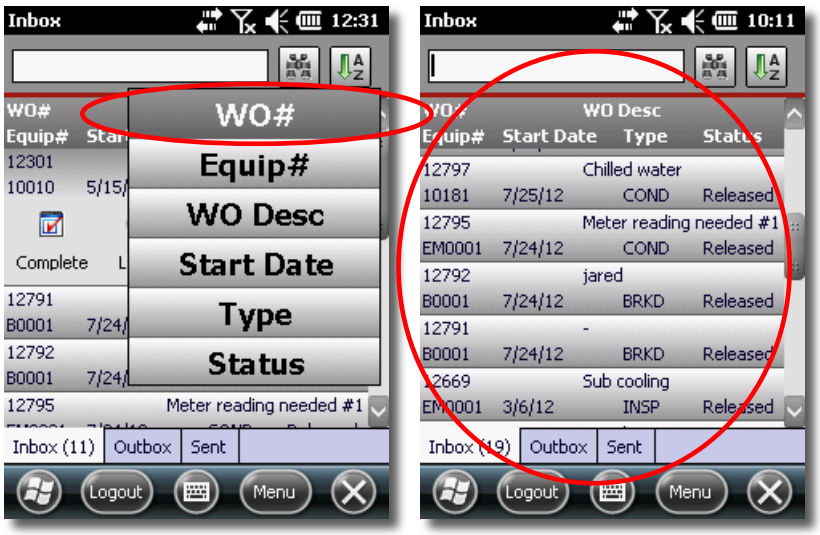
Sort

☞ To sort the list of work orders, click the **A to Z** button at the top right corner of the screen to display the sort options

☞ Select the desired option to sort the list based on that value

Sort Function

☞ To reverse the sorting order, simply reselect the same sort option again



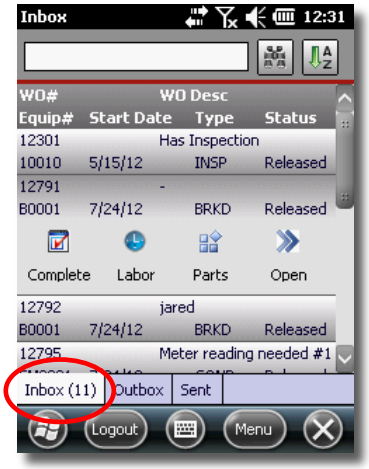
Reversing a Sort Order

☞ Observe that the order of the **Equipment #s** has been reversed

NOTE: *This functionality works for every sorting category.*

Work Order Inbox Tab

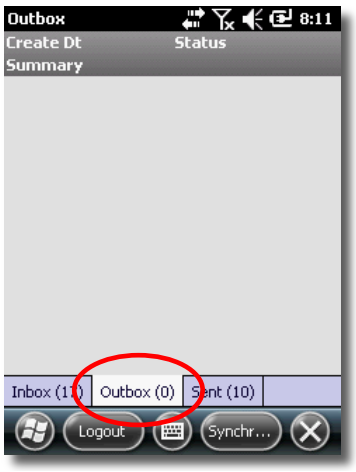
☞ This is the default tab when the application first starts up and displays all current/active work orders to be processed



Inbox Tab

Work Order Outbox Tab

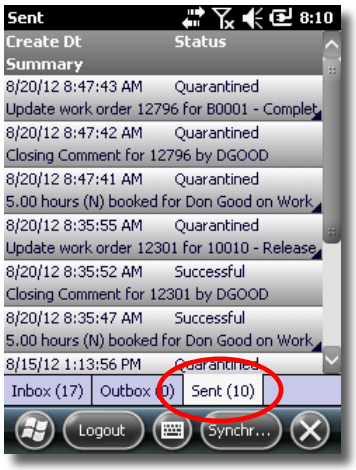
☞ The **Outbox** tab displays transactions (including labor, material, comments, completed work orders, etc.) that have been performed and await processing by the EAM server



Outbox Tab

Work Order Sent Tab

☞ This tab shows all work orders that have been closed and submitted to the main EAM server



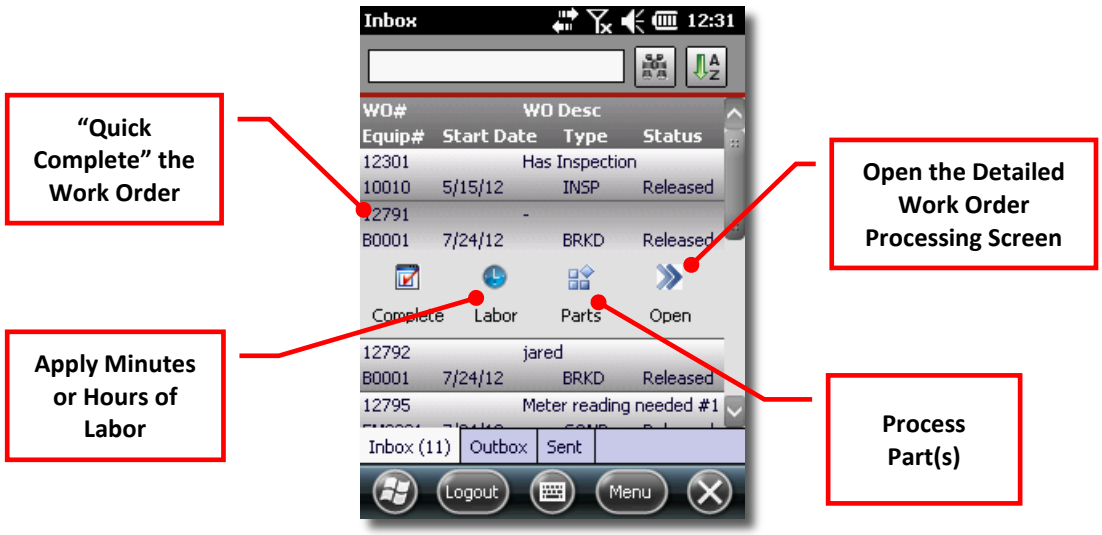
Sent box Tab

NOTE: *Search and sort options are only available in the Inbox Tab*

Quick Work Order Processing

Work Order Quick Menu Options

☞ Clicking on a work order will display the **Quick Complete** work order management options



Work Order Processing Options

NOTE: *Clicking on the **Menu** button allows access to these same functions and more.*

- **Complete –** Allows you to "quick complete" the work order by entering a short list of key fields
  *(see **Completing Work Orders** on page **21** for a detailed explanation)*
- **Labor –** Applies minutes or hours to the work order
  *(see **Applying Labor** on page **25** for a detailed explanation)*
- **Parts –** Includes specific information regarding the part(s) used to complete the job
  *(see **Applying /Adding** Parts on page **26** for a detailed explanation)*
- **Open –** Opens the details work order processing interface
  *(see **Open / Complete Work Orders** on page **27** for a detailed explanation)*

Main Menu Options

☞ Clicking the main **Menu** button will bring up key options for work order(s) and lists

Main Menu Options

- **Quick Complete –** Allows you to "quick complete" the work order by entering a short list of key fields
  *(see **Completing Work Orders** on page **21** for details)*
- **Labor –** Applies minutes or hours to the work order
  *(see **Applying Labor** on page **25** for details)*
- **Parts** – Includes specific information regarding the part(s) used to complete the job
  *(see **Applying /Adding** Parts on page **26** for details)*
- **Open –** Opens the detailed work order processing interface that includes many more data inputs
  *(see **Open / Complete Work Orders** on page **27** for a detailed explanation)*
- **New Work Order –** Creates a new work order
  *(see **Creating New Work** Order on page **45** for details)*
- **Ad Hoc Labor** – Allows the user to apply labor entries to work orders without associating them to a specific activity

- **Ad Hoc Meter Read** – Allows the user to apply meter readings to equipment without associating them to a specific activity
- **Filter –** Filters work order records based on all six options *(see* **Pre-Defined Search/Filters** *on page* ***15*** *for details)*
- **Sort –** Sorts work order records based on all five options *(see* **Sort** *on page* ***16*** *for details)*
- **Synchronize –** Synchronizes the handheld device with the main EAM server to upload all pending work completed and receive all new data *(see* **Synchronization / Re-Initialization** *on page* ***65*** *for details)*

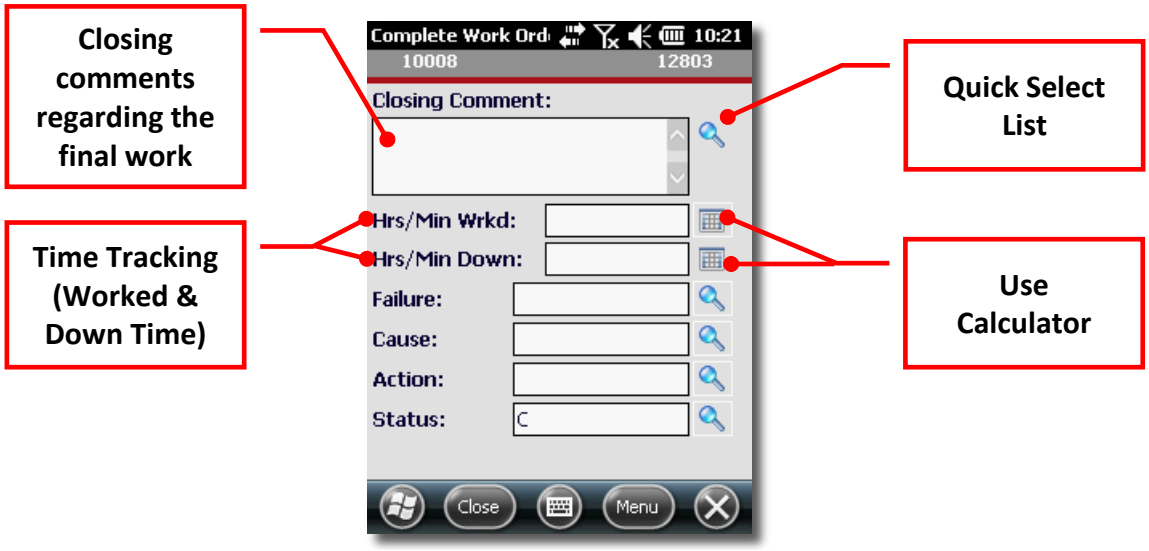
Completing Work Orders

☞ Select the **Work Order** to be processed (it will automatically expand)

☞ Click the **Complete** button to open the **Quick Complete** interface

The Work Order Complete Screen

- Enables you to complete a basic list of requisite data necessary for the closure of a ticket



Quick Closure Screen

- Select[1] / enter a **Work Order Closing Comment**
- Select[2] / enter a **Labor** record against the first associated **Activity**
- Enter **Equipment Downtime**
- Select **Failure**, **Cause** and **Action** codes related to the **Work Order Equipment**
- Set the **Work Order Status** (controlled by the Infor EAM Status Authorizations for the current user-account)
- Click **Save**

NOTE: *When the **Save** menu option is selected, the work order updates are immediately submitted to the server (if an active network connection is available) or stored locally (if no active network connection is available) to be submitted later.*

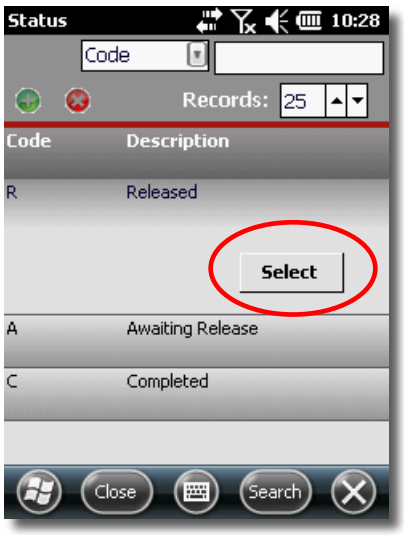
---

[1] ***NOTE:*** *See **Using the Quick Select Function** on page 25 for how this works*

[2] ***NOTE:*** *See **Using the Calculator** on page **26** for how this works*

Using the Quick Select Function

☞ Clicking on the **Magnifying Glass** button will always open an interface that allows viewing, searching and selecting pre-defined responses



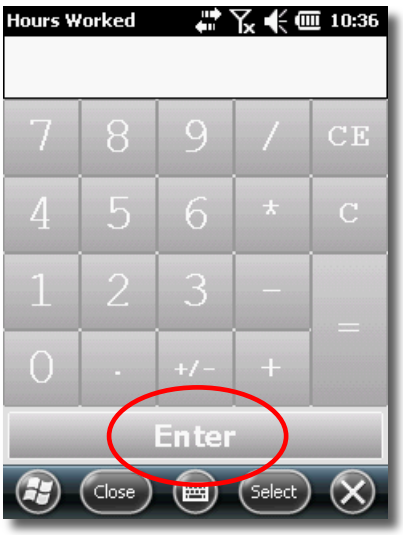
Quick Select Functionality

☞ Click on the value you want then click the **Select** button
(Shown here is the **Status** selection interface, but there are others like **Failure**, **Cause** and **Action**)

NOTE: *In cases where there are multiple options underneath a main option in the* ***Quick Select*** *interface, keep clicking down and selecting until you see the* ***Select*** *button.*

Using the Calculator

- Clicking on the **Calculator** will always open an interface that allows you to perform calculations and then enter the result back into the desired field.
- Perform the calculation to get the needed result

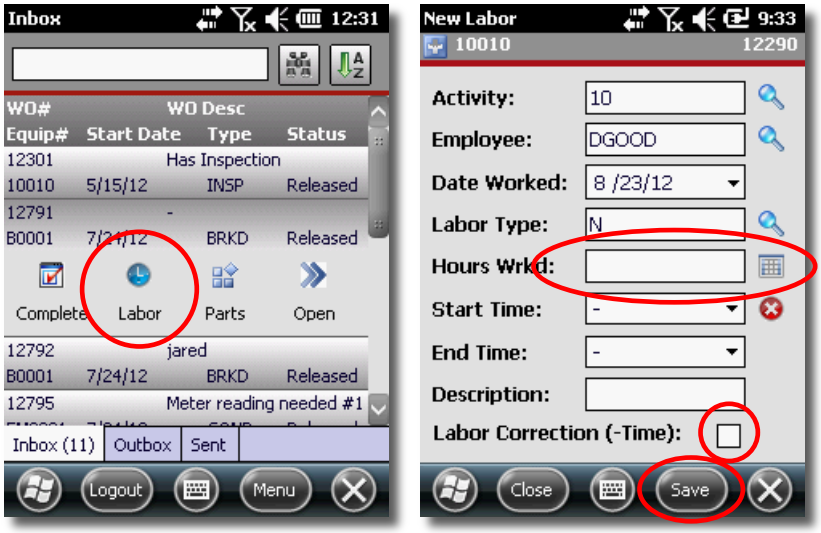


Calculator Functionality

- Click the **Enter** button to place the resulting calculation into the desired field

Applying Labor

- Click the **Labor** button in the work order Quick options



Applying Labor

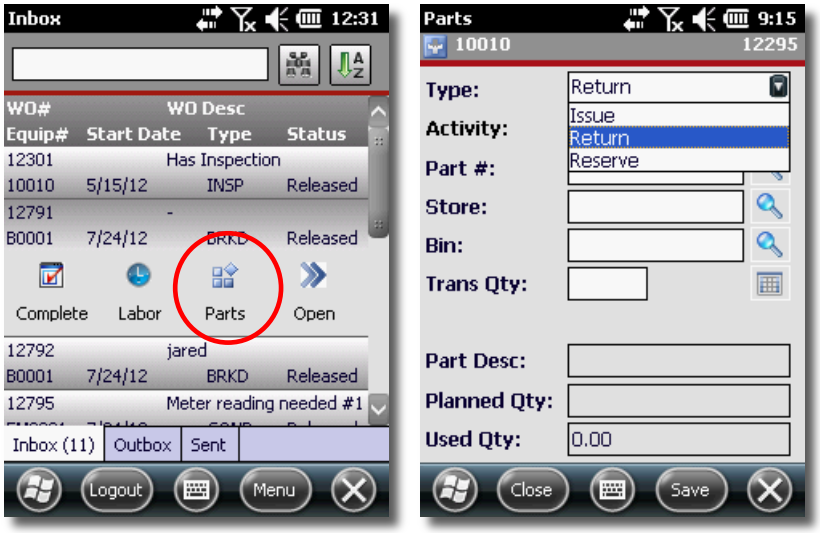
- Enter the amount of time spent in the **Hours Wrkd** field
- If this is a labor adjustment (a *reduction* in labor for the work order) then check the **Labor Correction (-Time)** box

NOTE: *The **Activity**, **Employee**, **Date Worked** and **Labor Type** fields should be pre-populated for you and can be altered at your discretion*

- Click **Save**

Applying /Adding Parts

☞ Click the **Parts** button in the work order Quick options



Parts Detail

The **Part Detail** screen allows you to:

- **Type** – Specify whether the Part transaction **Type** is to be an `Issue`, `Return` or `Reserve`
- **Activity** – Specify the **Activity** to issue the **Part** against[3]
- **Part #** – Select / enter the **Part #**[3] – the **Part Desc** field should be automatically populated

NOTE: *You may need to drop down multiple levels within the* ***Part# Quick Select*** *menu to select the part you want from the store you want*

- **Store & Bin** – Scan or enter the **Store**[3] and **Bin**[3] to decrement (`Issue`) or increment (`Return`) the **Transaction Quantity** against
- **Trans Qty** – Scan or enter the Transaction Quantity[4] indicating how many were used/applied

[3] ***NOTE:*** *See* ***Using the Quick Select Function*** *on page* ***25*** *for how this works*

[4] ***NOTE:*** *See* ***Using the Calculator*** *on page* ***26*** *for how this works*

Open / Complete Work Orders

A Work Order can also be opened via the **Open** button, and the additional detail and supporting information for the Work Order can be viewed.

Opening Work Order Details

☞ From the **Open** interface, a number of tabbed options are available to view and manage additional, detailed information on that work order including:

NOTE: *You can use the left and right arrows to scroll across all options.*

☞ Please see **Detailed Work Order Processing** on page **28** for a detailed explanation of this functionality

Detailed Work Order Processing

Activities Tab

The **Activities** tab displays the activities associated to the current work order.

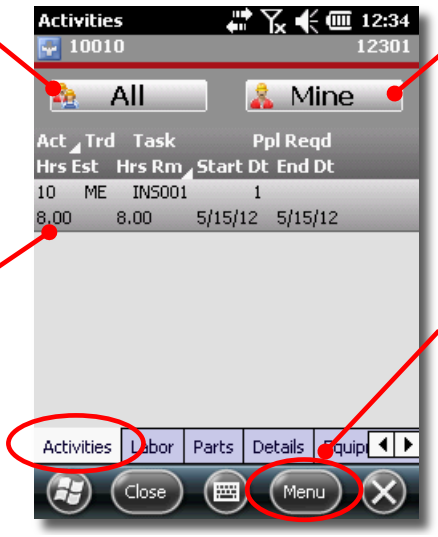
The list of activities can be filtered to display only those activities that have been assigned to the logged in Employee, or all activities regardless of assignment

The Activity Summary tab enables you to:

- Filter Activity Entries
- View the Activity Detail
- Enter Labor against an Activity

'All' Filter Button
Displays all work orders regardless of the user who did the work

Existing / Logged Activities
Click on this to expand available options



'Mine' Filter Button
Displays work orders scheduled to the currently logged in user only

Menu Button
Opens two available options for Activity Management

View Activities Screen

☞ Click on the **Activity** item or on the **Menu** button to expose options for adding additional labor or opening the activity

Activities Management Options

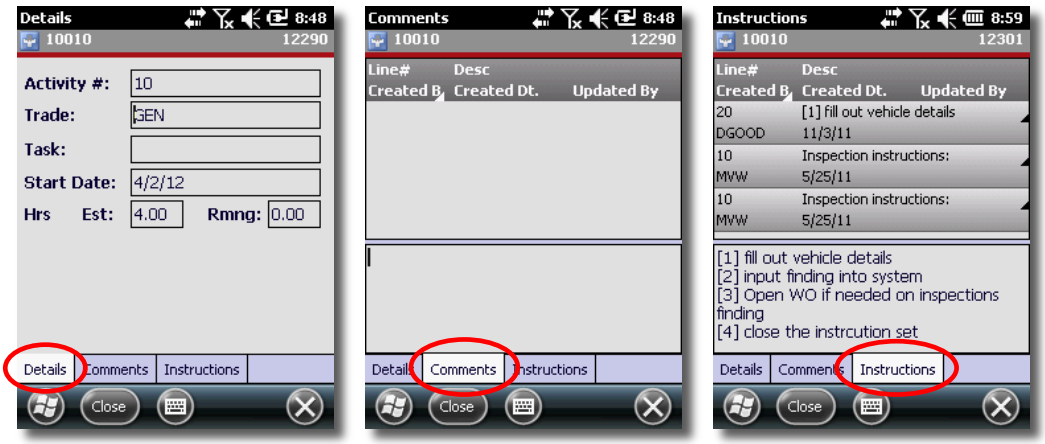
Activities Add Labor

☞ This is the same interface as the **Quick Labor** entry screen detailed earlier

Activities Add Labor Screen

Activities Details

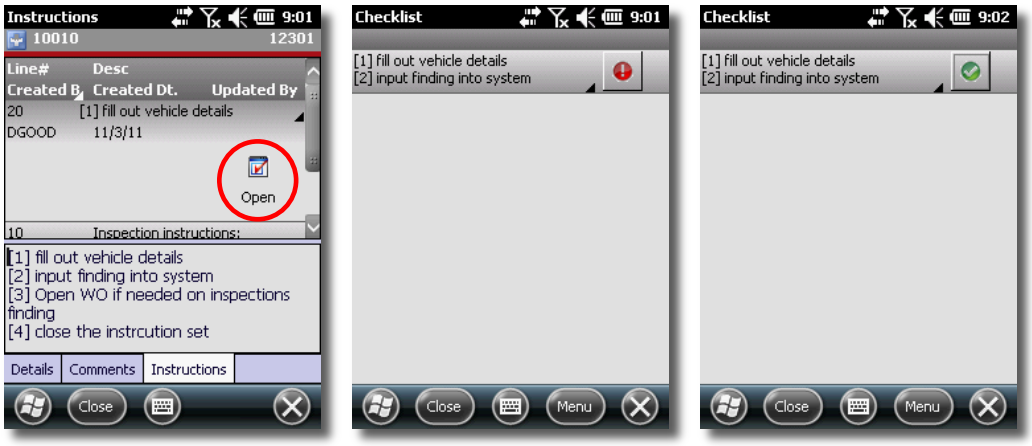
- Clicking the **Open** button or selecting **Open** from the **Menu** option will allow access to the following three READ ONLY tabs:
  Details, **Comments** and **Instructions**



Activities Details, Comments & Instructions

Activities Checklists

- Select the **Instructions Tab** and click on the **Checklist** you require
- Click the **Open** button



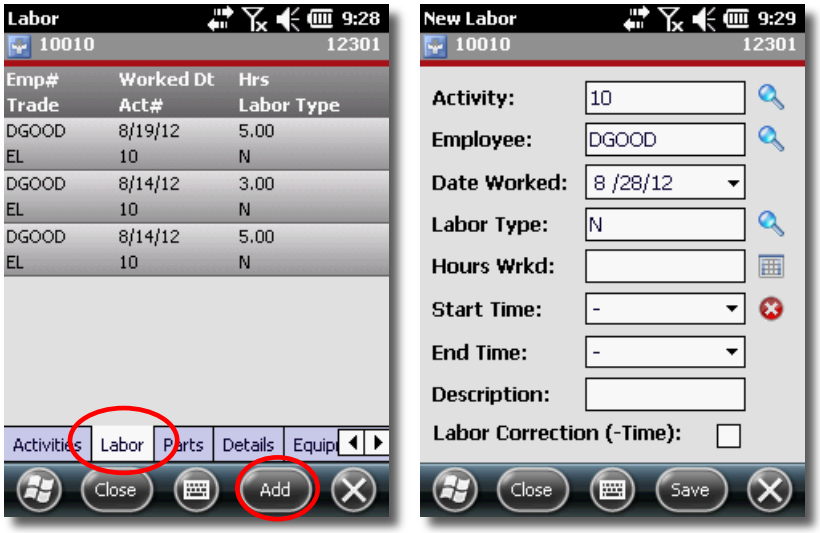
Checklist Line Items

- As you complete each checklist item, click the red exclamation point n( )

- When all line items are checked off, click **Close**
- These results will be stored in the **Word Order Comments**

Labor

- The **Labor** tab displays all (READ ONLY) labor entries associated to the current work order



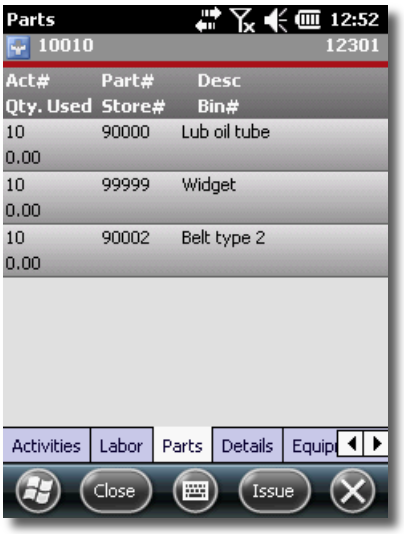
Labor Summary Screen & Add Labor

- The **Labor** tab also enables you to add new **Labor** entries via the **Add Labor** screen as described earlier in this document

Parts

- Click the **Parts** tab to display any **Planned Materials** that have been associated to the work order as well as any **Parts** or **Materials** that have been issued against the work order

☞ **Planned Materials** are indicated as **Part** entries that have a quantity of zero (0) or the field will be empty.



Parts Summary Screen

NOTE: *These entries are applied as **Issues**, **Returns** and/or **Reservations** against the work order.*

The **Part Detail** screen enables you to:

- Indicate whether the **Part Transaction** is to be an **Issue** or a **Return**
- Select the **Activity** to issue the **Part** against
- Scan or enter the **Store** and **Bin** to decrement (`Issue`) or increment (`Return`) the **Transaction Quantity** against
- Scan or enter the **Transaction Quantity**

☞ All **Parts** entries can serve as templates for additional issues by selecting the entry and clicking the **Issue** button or menu item

Issue Parts Screen

- Select an **Issue** button to bring up the Parts entry screen detailed earlier in this document

Details

- The **Details** tab displays read-only Work Order information

Work Order Details Screen

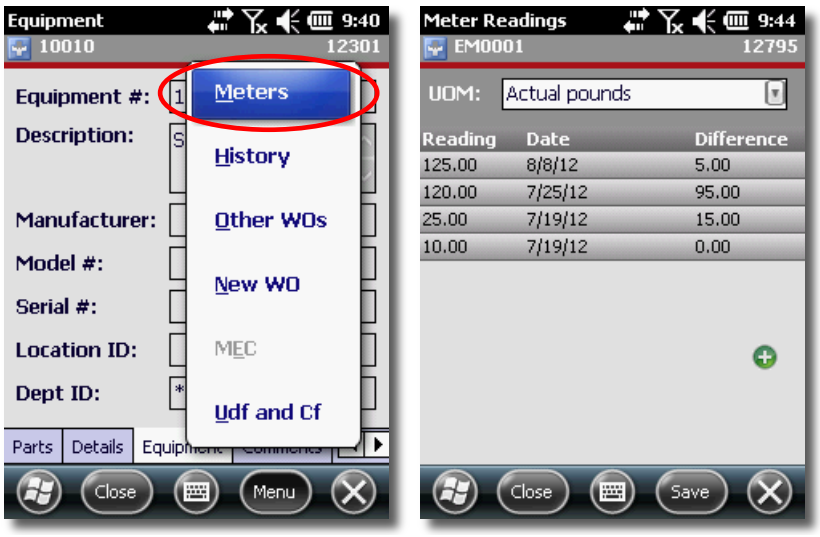
Equipment

☞ The **Equipment** tab displays read-only **Equipment** data for associated **Equipment**

Work Order Equipment Details Screen

Meters Summary

☞ The **Meters Summary** dialog displays readings associated to the **Equipment**



Meters Readings List

- **Readings** are filtered on the **UOM** value (feet, inches, etc…) combo-box
- New Meter Readings are captured by clicking the **green plus sign** ( )

Meters Screen

- Scan / enter the new reading value in the **New Value** textbox
- Click the **Save** button

NOTE: *New meter readings must have a higher value than the previous reading, or they will be disallowed and not saved.*

Work Order History Summary

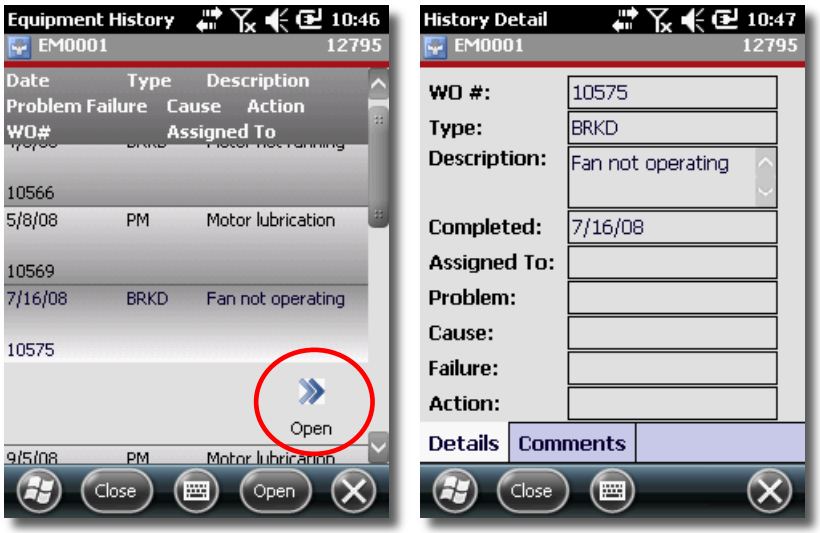
The History Summary dialog displays a list of Work Orders that were previously completed for the current Equipment

- Additional details can be viewed by clicking an **Open** button

☞ The **History Detail** dialog displays read-only historical work order information

Equipment History

☞ Select the desired entry to expand it and expose the Open button



Equipment History Details

☞ Click the **Comments tab** to see a list of any available READ ONLY comments associated with the **History Detail**

Other WOs (Associated Work Orders)

The **Other WOs** UI displays work orders with the same equipment.

☞ Click the **Equipment Menu** button and select **Other WOs**

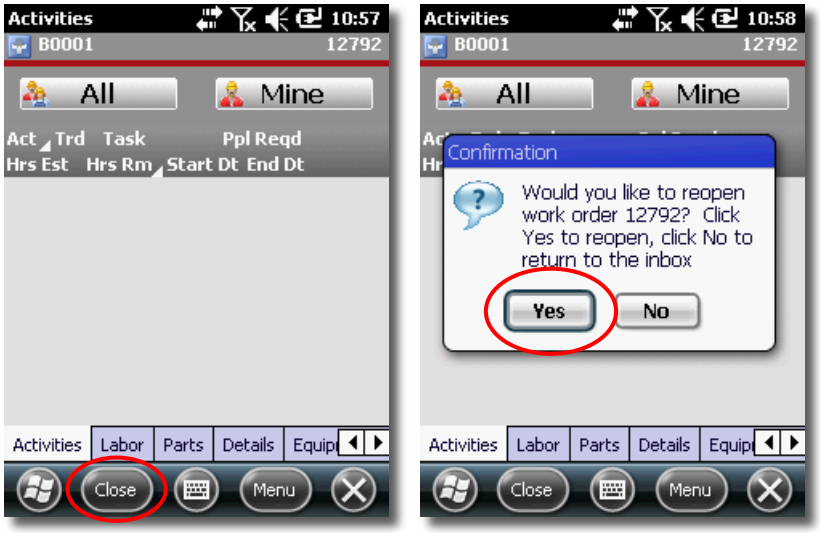
Other WOs

☞ Click an entry to expose the **Open** button and switch to another work order

Associated Work Orders Screen

☞ Work with the **Work Order** normally

☞ Click **Close** when finished



Return to Work Order Message

☞ Select **Yes** to return to the original Work Order

RECOMMENDATION
It is recommended that you save all progress on a ticket prior to navigating to another one

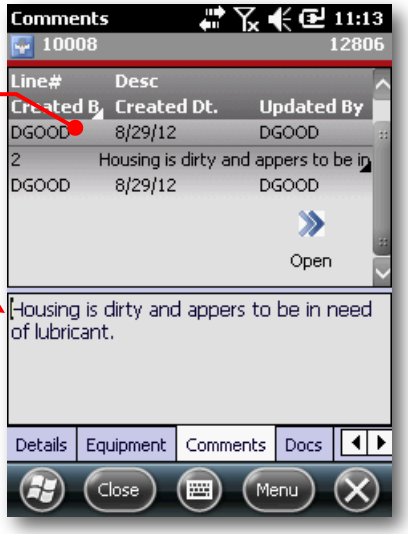
New Work Order

- See section **Creating New Work** Order on page **45** for details on this interface

Comments

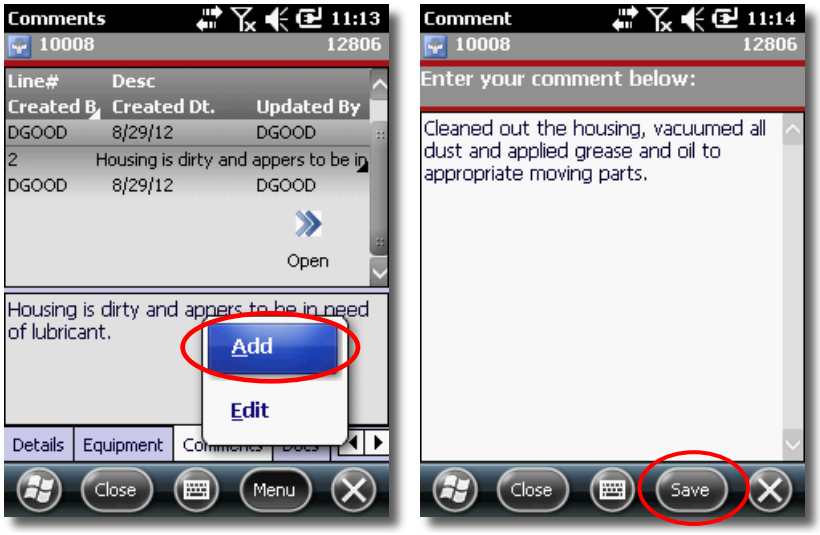
The Comments tab displays a list of Standard **Work Order** Comments associated to the current Work Order.

View the summary of a comment by clicking on the record you want to review.



Comments Screen

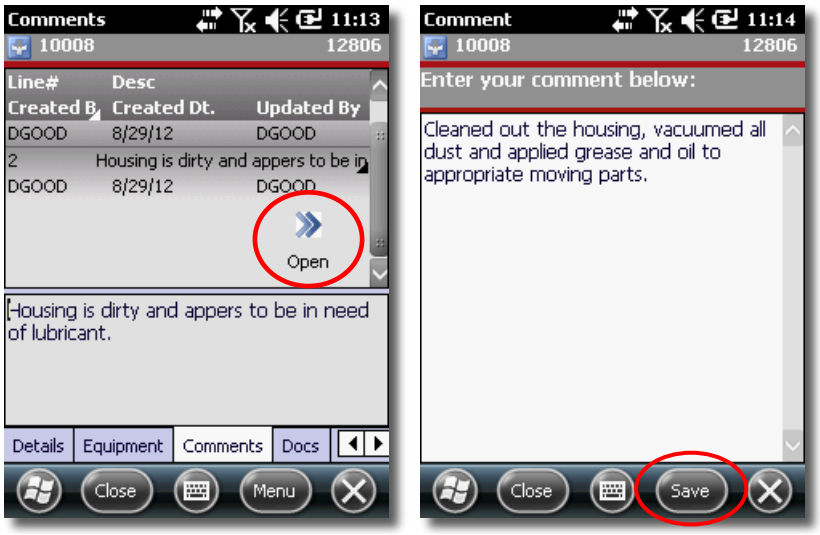
☞ Add a new comment by clicking on **Menu > Add**



Add New Comment Screens

☞ Enter the new Comment and select **Save**

☞ Edit a comment by clicking **Menu> Edit** or the **Open** button **Comment** menu item

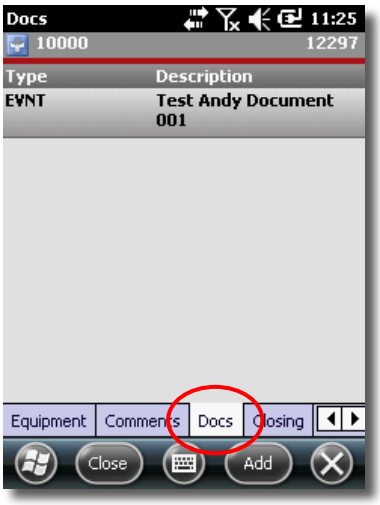


Edit Comment Screen

☞ Select **Save** to save your changes

Documents

The **Document** tab allows you to attach or review documents.



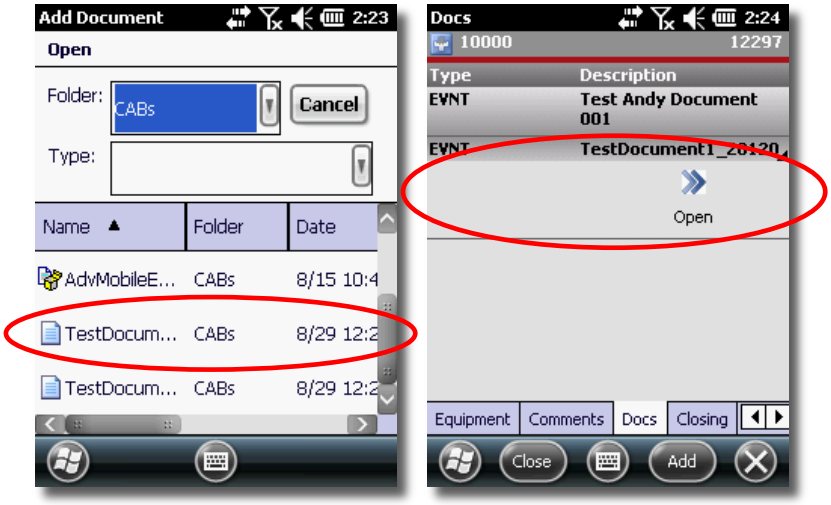
Closing Main Screen

☞ Select the **Add File** button to attach a new document

Document Add Menu

☞ Select the **Menu** button and select **Attach**

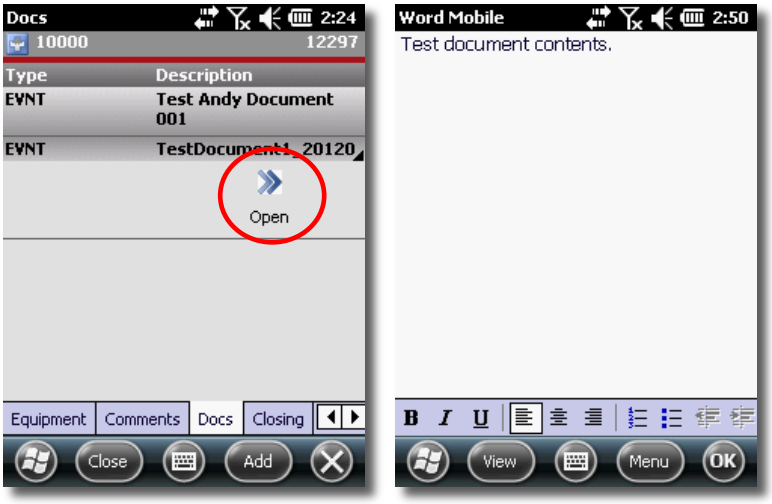
☞ Select the document you wish to attach



Document Add UI

☞ The document will automatically be attached to the **Work Order**

☞ Click the **Open** button to *view* an attached document



Document View UI

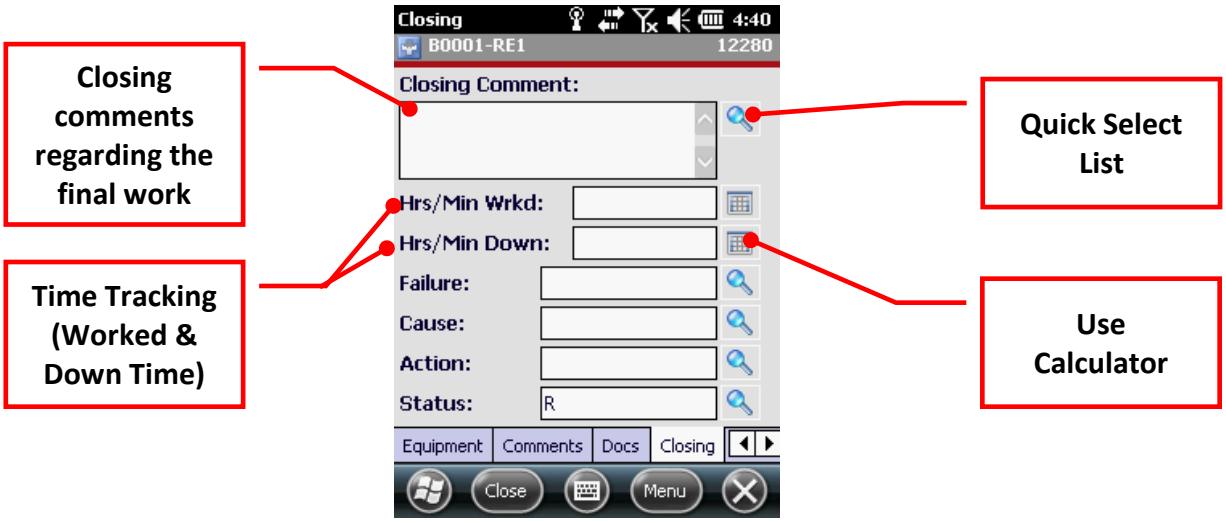
☞ Making changes to the contents is accomplished by simply typing and deleting like any normal document, HOWEVER, these changes are LOCAL only and are not carried back to the EAM server

☞ The **Document Menu** allows for some common word-processing commands as well as several enhanced editing commands via the **Document Edit Menu**

WARNING:
ALL changes made to attached documents are *LOCAL* only.
Changes to documents are NOT passed to the EAM Server

Closing

The **Closing** tab displays information related to the closing (aka completion) of the current work order.



Closure Screen

- Select[5] / enter a work order **Closing Comment**
- Select[6] / enter a **Labor** record against the first associated **Activity**
- Enter **Equipment Downtime**
- Select **Failure**, **Cause** and **Action** codes related to the work order **Equipment**
- Set the work order **Status**

NOTE: *The **Status** list of values is determined by the Infor EAM **Status Authorizations** list for the current User.*

☞ Click the **Save** menu option if you are finished

Signatures

Work Orders can store the signature of customers when they are complete

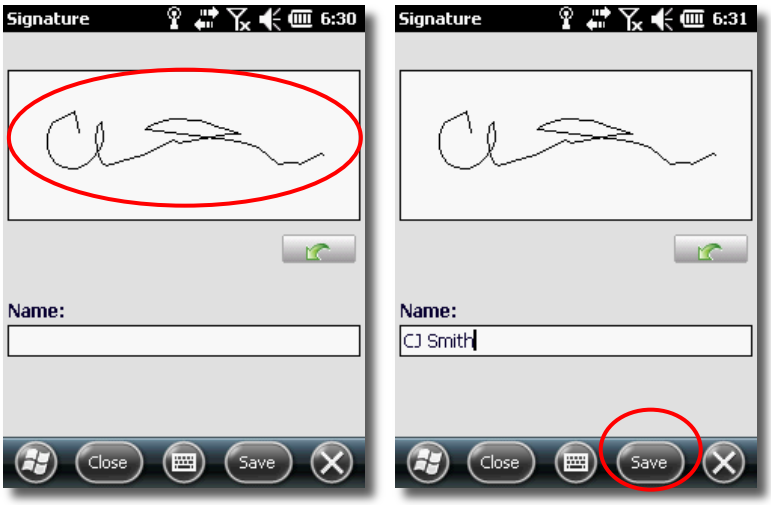
☞ On the Closure tab, select the Menu button and select **Signature**

[5] ***NOTE:*** *See **Using the Quick Select** Function on page **25** for how this works*

[6] ***NOTE:*** *See **Using the Calculator** on page **26** for how this works*

Closure Menu

- Using a stylus, have the customer sign the **Work Order**



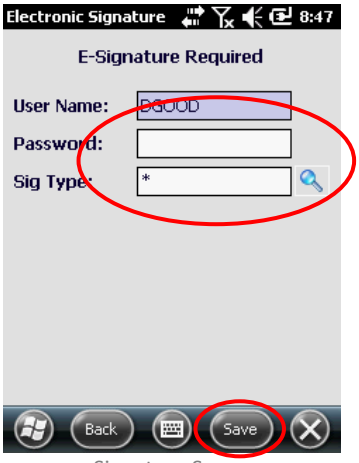
Signature Screen

- Type in the customer's name in the **Name field** and select **Save**
- The system will save the data and return the user to the Work Order main screen

eSignatures (Optional Add-On Module)

The Admin Portal can be configured to require devices to force an **eSignature** prompt. (Please see the Admin Portal configuration guide for details on this process)

- ☞ Process and close the Work Order as detailed earlier in this document
- ☞ Upon closure, the device will prompt with a required **eSignature** screen



eSignature Screen

- ☞ The **USER** must enter his or her password and select a signature type
- ☞ Click **Save** and the system will save the date and return the user to the Work Order main screen

Creating New Work Orders

The Create **WO** dialog allows you to create a work order in the field.

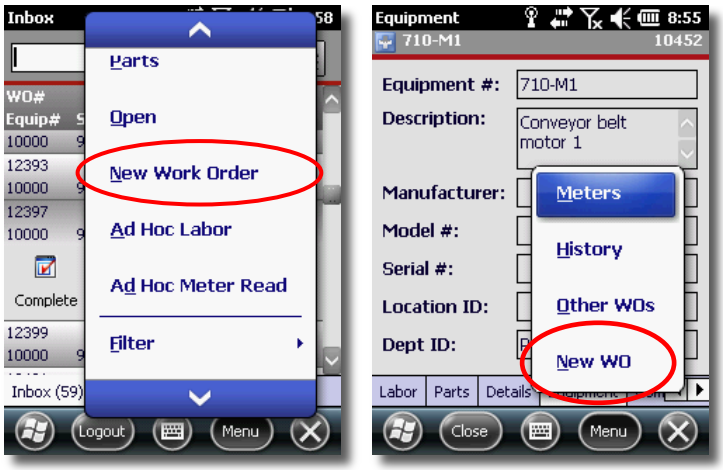
- Select the New Work Order option from Work Order main menu or open an existing Work Order and navigation to or the **Equipment Tab**

Select New WO Option

- If prompted to cancel edits, select **Yes**

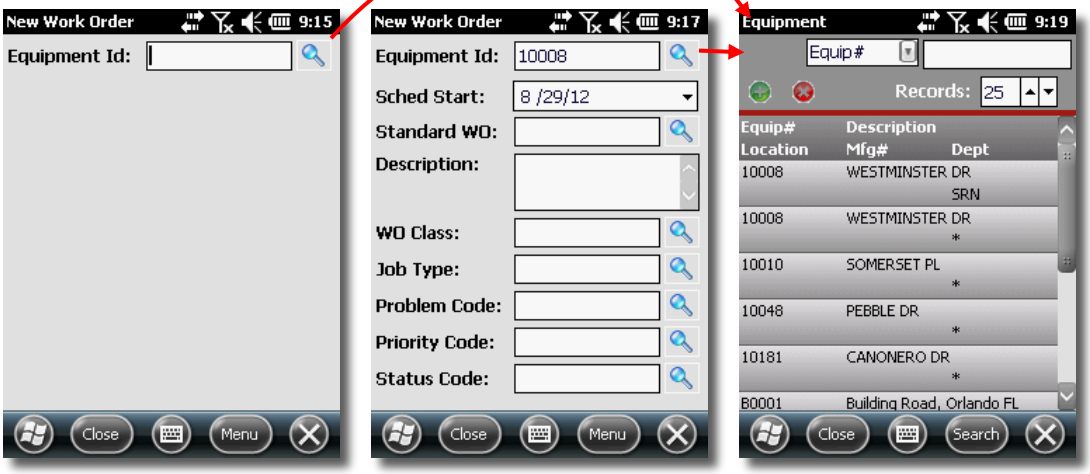
New Work Order Cancel Edits Prompt

- In cases of working **Equipment ID** will automatically populate, and in cases of a new work order you will need to select the **Equipment ID**



Select New WO Option

☞ In the case of starting from the Equipment tab, you can leave the automatically populated Equipment ID or you can, in either case, click the **Search** button to input a different **Equipment ID**

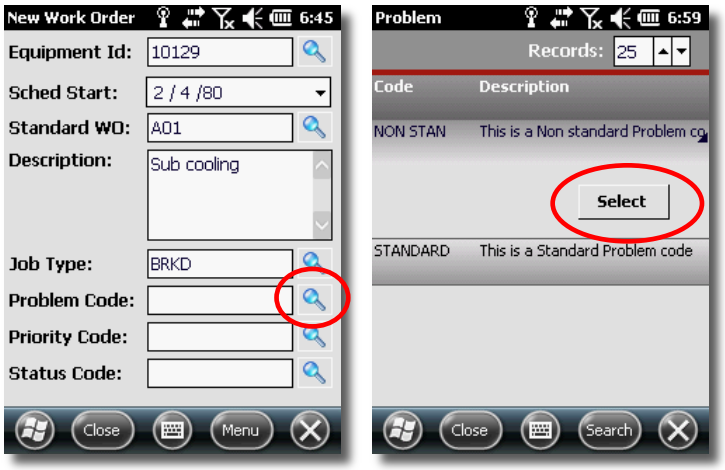


Selecting or Searching the Equipment ID

☞ Select the **Magnifying Glass** button next to the **Standard WO** text field

Selecting the Standard WO Data

- ☞ Click on the desired work type and then click the **Select** button
- ☞ Click the **Magnifying Glass** button next to the **Problem Code**



Selecting the Problem Code

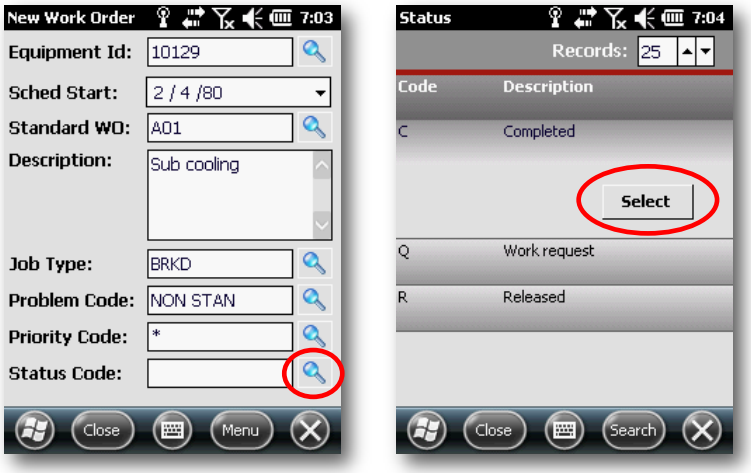
- ☞ Click on the desired **Problem Code** (optional)
- ☞ Click the **Select** button

☞ Click the **Magnifying Glass** button next to the **Priority Code** (optional)

Selecting the Priority Code

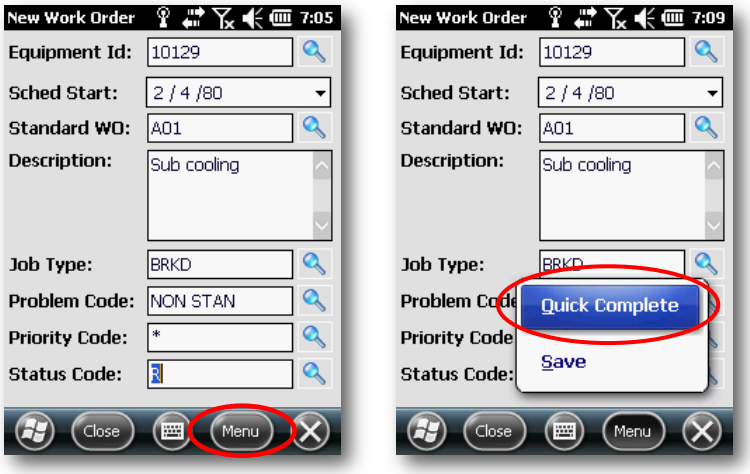
☞ Click on the desired **Priority Code** and select the **Select** button

☞ Click the **Magnifying Glass** button next to the **Status Code**



Selecting the Status Code

☞ Click on the desired **Priority Code** and select the **Select** button



Saving New Work Orders

☞ Select **Quick Complete** to close out the WO or **Save** to work on it later

Ad Hoc Labor Entries

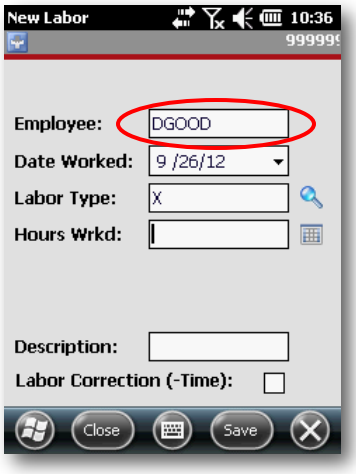
Users can log time without associating that labor entry to a work order

☞ From the main screen select **Menu**

Ad Hoc Labor Menu Option

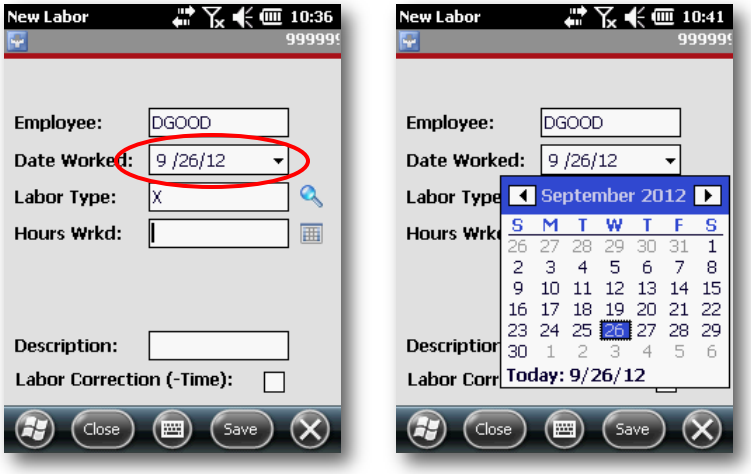
☞ Select **Ad Hoc Labor**

☞ The **Employee** value will be pre-populated and cannot be changed



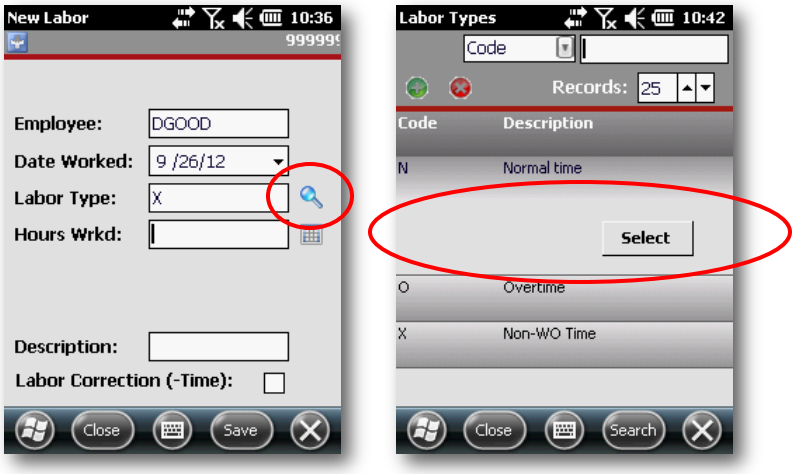
Ad Hoc Labor Employee Identification

☞ Specify the **Date Worked** if it is different from the auto-populated date



Ad Hoc Labor Date Worked

☞ Specify the **Labor Type** if it is different from the default value



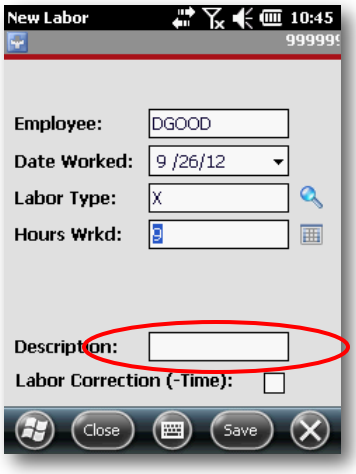
Ad Hoc Labor Labor Type

☞ Specify the **Hours** worked

Ad Hoc Labor Hours Wrkd

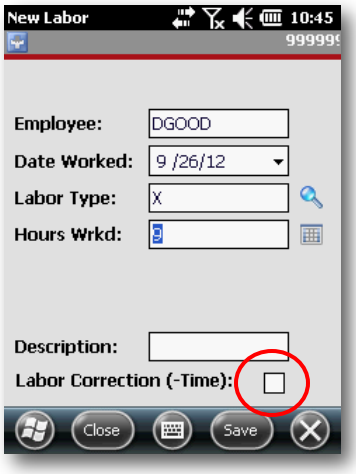
☞ Enter the number or click the numeric buttons and then click **Select**

☞ Enter a **Description** if applicable (not required)



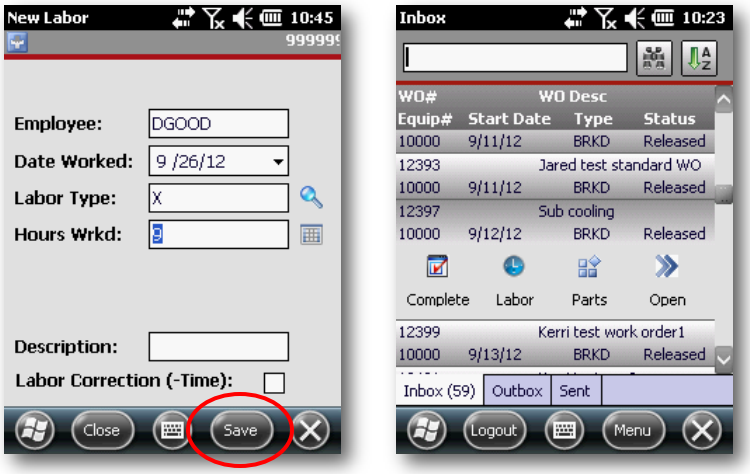
Ad Hoc Labor Description

☞ Select the **Labor Correction** checkbox if this is a reduction in the time spent on a specific activity



Ad Hoc Labor Labor Correction

☞ Click **Save** to apply the labor entry to the user's time tracking



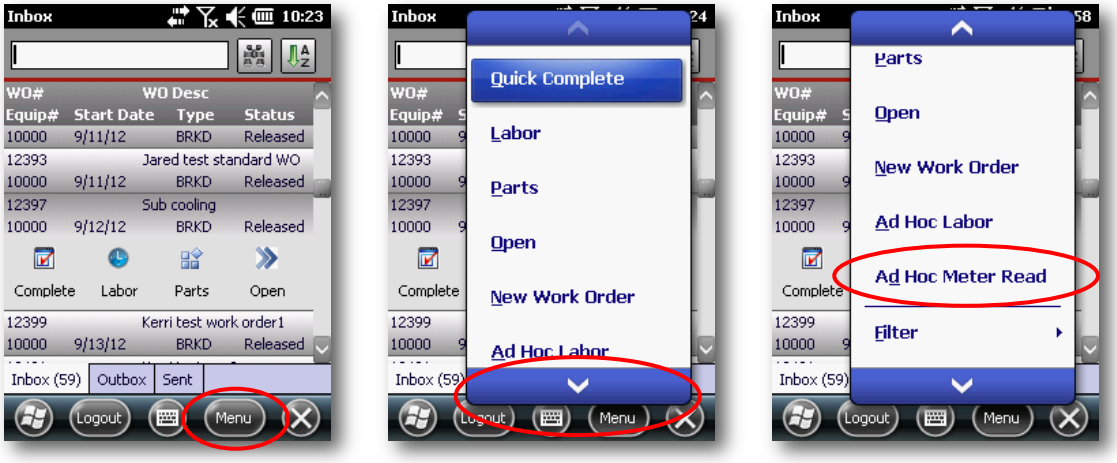
Ad Hoc Labor Menu Option

☞ The system will return you to the **Main Screen**

Ad Hoc Meter Readings

Users can log meter readings without associating that reading to a work order

☞ From the main screen select **Menu** and click the down-arrow to scroll



Ad Hoc Labor Menu Option

☞ Click **Ad Hoc Meter Read** to log a new Meter Reading

☞ Enter the **Equipment ID** if you know it or click the **Search** magnifying glass

Ad Hoc Meter Reading Equipment Search

☞ With or without entering some or all of an **Equipment ID**, click the **Search** button

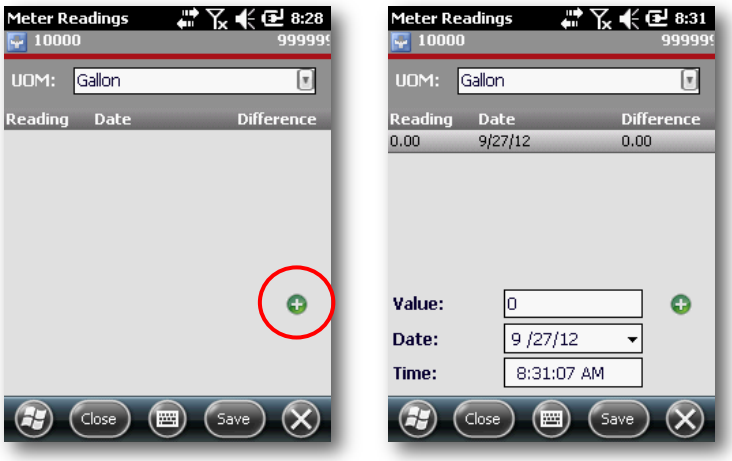
Ad Hoc Meter Reading Search Results

☞ Click on the desired equipment and click **Select**

- When the system returns to the initial meter read equipment page, the field should be populated with the selected **Equipment ID**

Ad Hoc Meter Read Screen

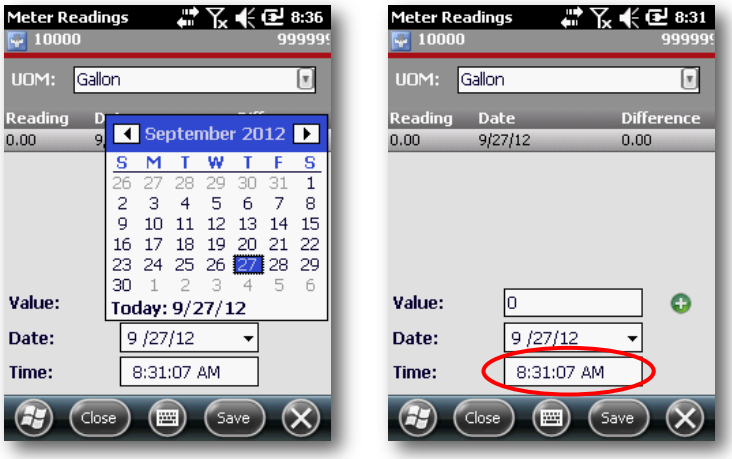
- Click the **Read** button to enter the **Ad Hoc Meter Read** interface
- Click the green **Plus** sign ( )to create a new entry



Create New Ad Hoc Meter Reading

- Enter the reading from the meter into the **Value** field

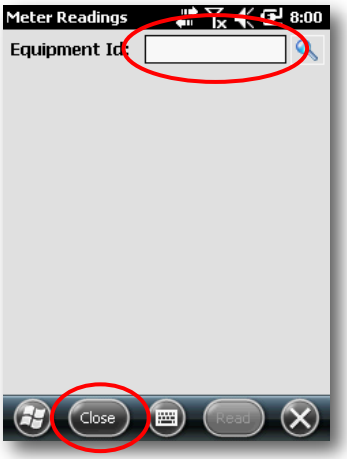
☞ Specify the appropriate **Date** and **Time** taken



Specifying Date & Time of Ad Hoc Meter Reading

☞ Click **Save**

☞ The system will return you to the Meter Reading Equipment Search screen



Ad Hoc Meter Reading Equipment Search

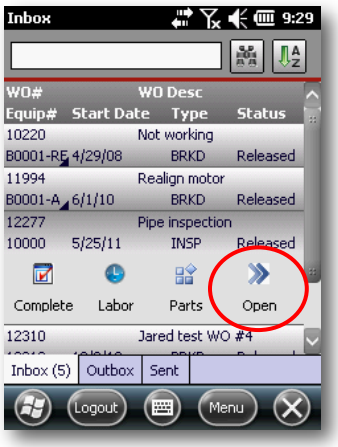
☞ Either proceed with another **Equipment ID** or click **Close** to return to the Work Order Management Main Screen

Inspections

Inspections for processing scheduled inspections assigned in the EAM Server.

Opening Inspections

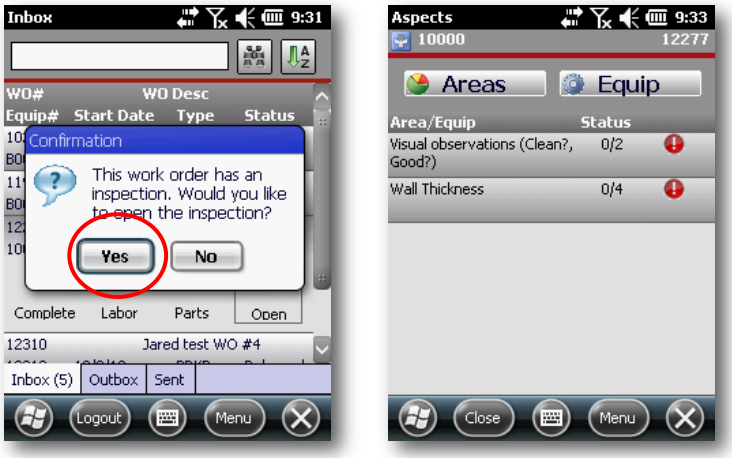
☞ Select the desired inspection from the main list of available work orders



Main Menu Inspection Selection

☞ Select **Open**

☞ If prompted to open the inspection, select **Yes**



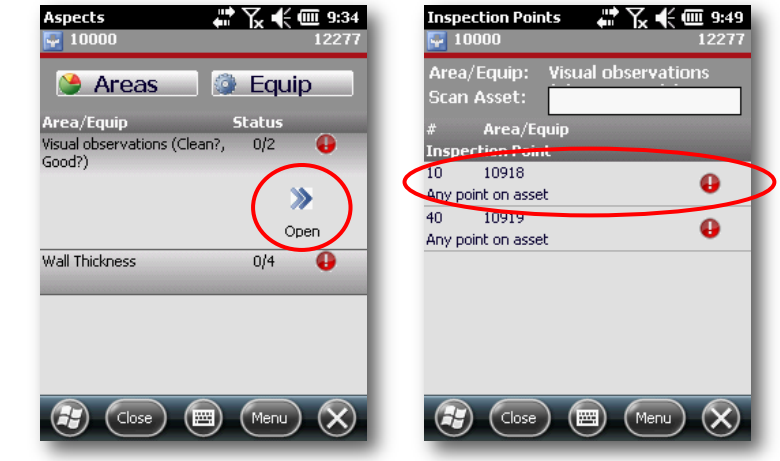
Inspection Open Prompt

☞ Select the inspection points for either the **Areas** or the **Equip** option

Areas and Equipment Inspection Items

☞ Select an **Inspection Item** and it will expand

☞ Click **Open**



Inspection Point

☞ Select the **Inspection Point** to expand it or scan in the **Asset ID** (not all devices are equipped with scanners)

☞ From the **Inspection Item Main Menu**, you can select **Open All WO Pts** open all **Inspection Points**

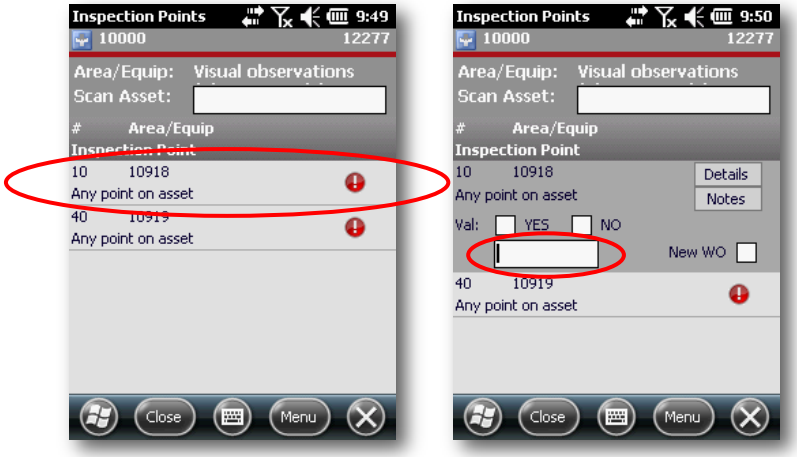
Inspection Item Main Menu

☞ From either the default or **All Open** screen, select the desired **Inspection Point**

Inspection Point Types

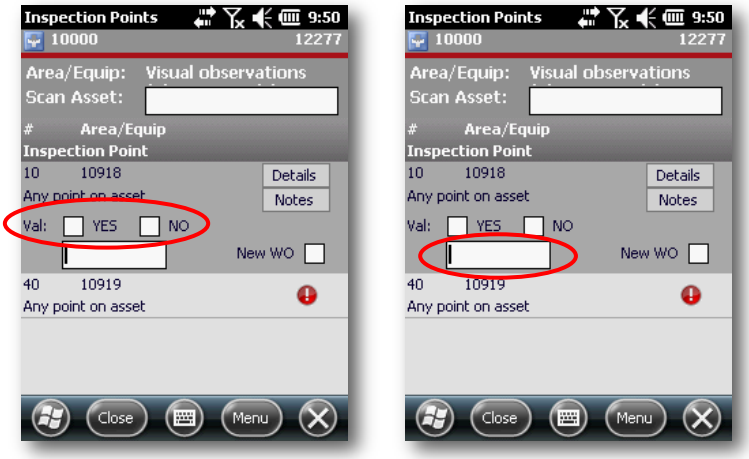
Yes / No Inspection Points

☞ You can enter any appropriate value in the text box



Yes / No Inspection Point

☞ If the inspection point passes, select **YES**, if not, select **NO**



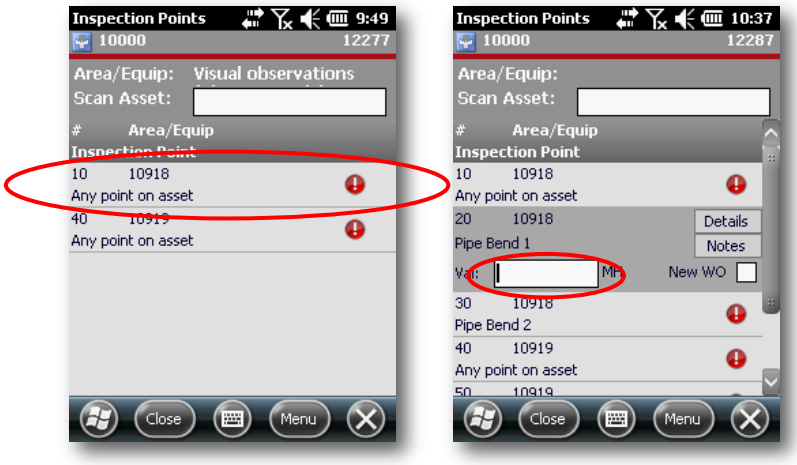
Processing Yes / No Inspection Points

☞ If you select **NO**, the system will automatically select the **New WO** checkbox and open the Notes (**Findings**) UI

*NOTE: See **Findings and Details** on page **61** for more information*

Value Inspection Points

☞ Select the desired Inspection Point



Value Inspection Point

- Enter the **Value**
- If you put in a value outside the accepted range, the system will automatically select the **New WO** checkbox and open the Notes (**Findings**) UI

*NOTE: See **Findings and Details** on page **61** for more information*

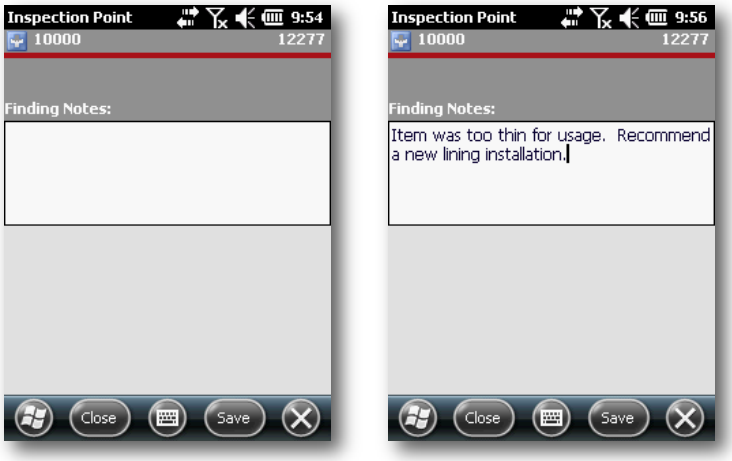
- Click on the next inspection point

Findings and Details

All Inspection Points have additional information under the Details and Notes buttons / menu options.

***NOTE:** Clicking the **Notes** button will bring you to the Findings UI*

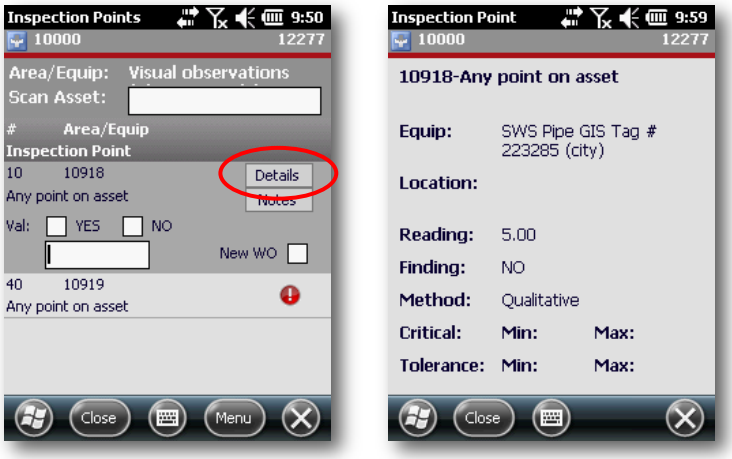
- At the Finding Notes screen, you can enter any additional information regarding the findings of the **Inspection Point**



Findings UI

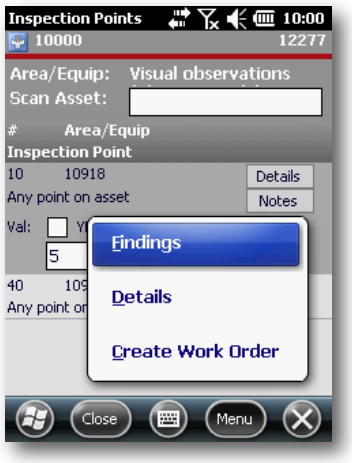
- Click **Save**

☞ Select the **Details** button to review the details of the **Inspection Point**



Details UI

☞ You can select the **Findings**, **Details** and **Create New Work Order** options from the main menu



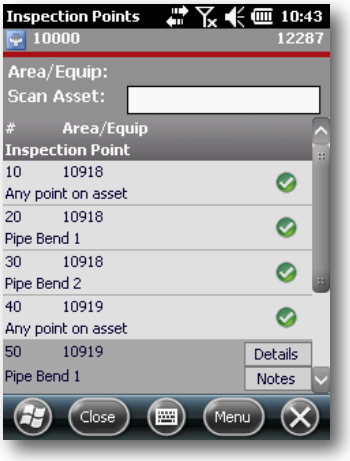
Inspection Point Menu

☞ Selecting **Create Work Oder** will take you to the standard Create Work Order UI

NOTE: *See Creating New Work Orders on page 45 for more information*

Completing Inspections

☞ When all Inspection points of the Inspection Item have been completed, the Inspection Item will be displayed with a green checkmark



Completed Inspection Points

☞ Proceed with the next **Inspection Item**

☞ When all Inspection Items have been completed, the Inspection itself can be **Completed**

NOTE: *See* ***Closing*** *on page* ***43*** *for additional information*

Synchronization / Re-Initialization

Many activities within a work order result in data changes that are immediately queued for synchronization to the server. If the device has an active network connection at that time, these changes will be immediately synchronized. If the device does not have an active network connection, the changes will remain on the device until:

- The auto-sync interval lapses and an active network is available

  or

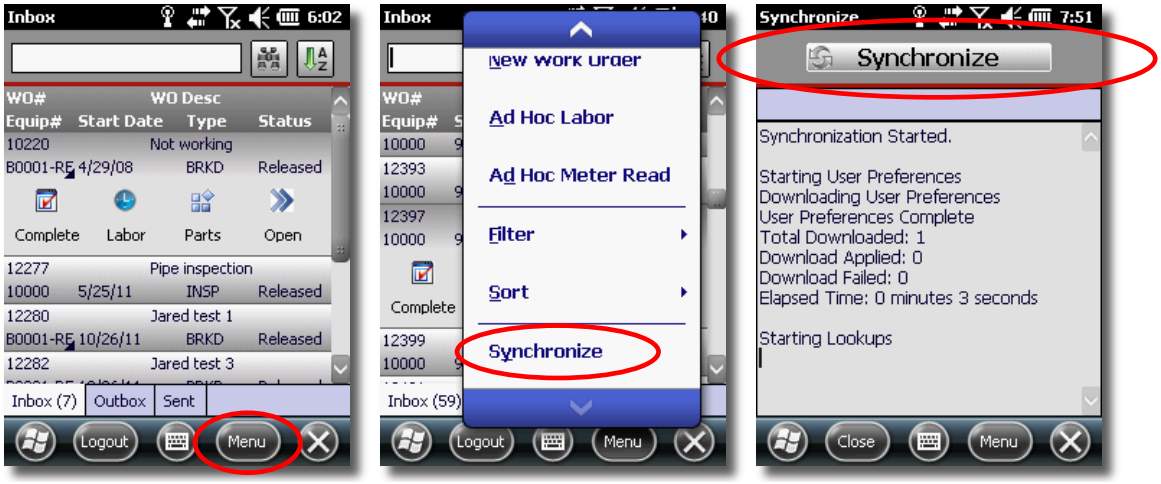
- Another update is made and an active network is available

  or

- You manually initiates a synchronization process

☞ Ensure that the device is connected to an active network

☞ Select the **Menu** button and select on the **Synchronize** link in the menu



Synchronization

☞ Select the **Synchronize** button

☞ If this the first time the user has logged on, the device will contact the **Advanced Mobilem EAM** server and retrieve a current snapshot of the mobile database

☞ If the initial "snapsnot" has already been retrieved, **Synchronize** will sync differences between the device and the EAM server

> **RECOMMENDATION**
> If the handheld unit has been powered off or disconnected from the network for more than 24 hours, it is recommended that you re-initialize the database, and this process can be run at any time.
>
> ***NOTE:*** *This WILL NOT lose any local data.*

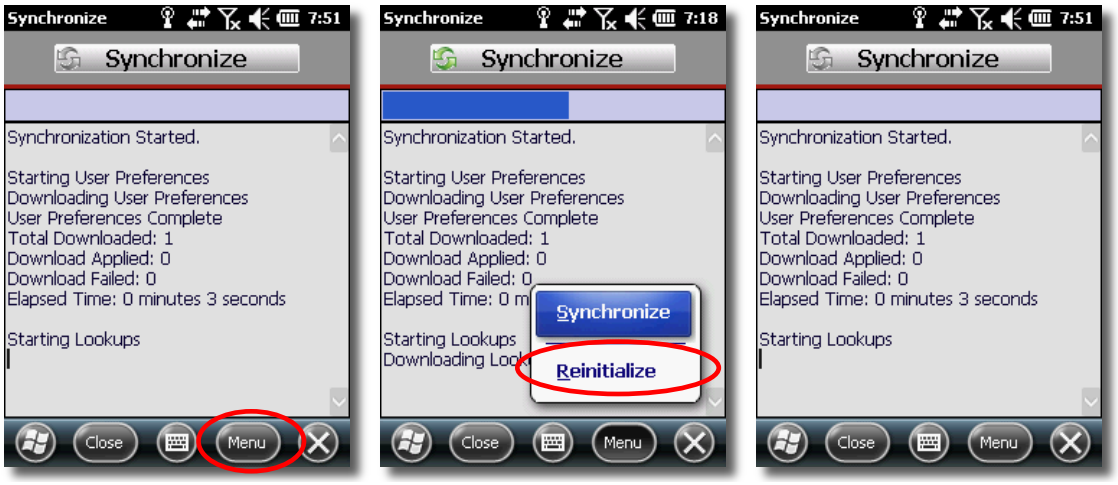
- Pending updates are synchronized with the server first, then pending changes from the server are synchronized with the device
- Status updates are displayed for every primary 'Entity' (aka business object) that is being synchronized
- When the synchronization process is complete, a 'Completed' message will be displayed

NOTE*: Once a synchronization process is initiated, it is not necessary to stay on the Synchronize screen, though it is recommended*

☞ Once the synchronization process is complete, select the **Close** button

Initialization / Reinitialization of the Database

☞ From the main **Work Management** screen, click on the **Menu** button and select **Synchronize**



Re-Initialization of Whole Database

☞ Select **Reinitialize** and wait for the system to rebuild your whole database

Troubleshooting

Work Order does not disappear when status is set to Completed (or set to another status that should remove it)

Check the **AMDeviceCompleteStatus** value on the **Administration Portal > Modules > Work Management > Install Parameters** page

This value should be a comma-delimited list of **Work Order Status Codes** that should not be displayed in the **Inbo**x

Cannot find application Start icon

Check both **Start Menu** and **Programs** folder

If not found, contact your System Administrator to provision the correct application to the device

Application does not start

Check the device memory[7]

Application starts but displays licensing dialog

Provide your System Administrator with the **Device ID** for license provisioning

Application runs extremely slowly

Close and restart application

If the issue persists, check for other running applications and/or processes and if necessary, reset (warm boot) the device

Application crashes

Check device memory[3]

Device locks up.

Reset (warm boot) device.

Check device memory[3]

[7] *Application memory should have >= 25 MB available; Storage memory should have >= 10 MB available.*

Unable to log into application

Check network connectivity.

If the issue persists, contact your System Administrator to ensure the user-account being input is authorized and that the device is licensed

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