



Infor EAM Work Management & Inspections w/ GIS

User Guide – Tablet Edition

Software Version: 1.8.3.3
Document Version: 1.0
Document Status: Published
Published: 12/10/2013



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Document History

Date	Change/Revision	Version	Author
11/21/2013	Initial Creation	1.0	Christopher Ficco

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Introduction

Welcome to the Infor EAM Work Management & Inspections w/ GIS User Guide. 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:

Select 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**

Contacting Infor Global Solutions

Mailing Address

Blue Dot Solutions, Inc.
1900 Grant Street
Suite 800
Denver, CO 80203

Phone

North America Support	1-866-303-8324 x2
United Kingdom Support	44-(0)-141-404-6316

Web Site

<http://www.bluedotsolutions.com>

Overview

Advanced Mobile for **EAM Work Management & Inspections with GIS** 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 tablet computing devices to facilitate the creation, receipt, review and modification of EAM Work Order data in the office and 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 & Inspections with GIS** application features and usage.

System Requirements

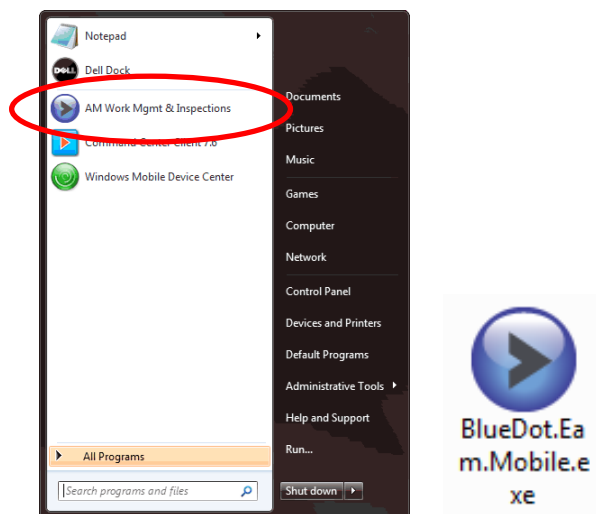
The following components are required to run the Advanced Mobile for EAM Work Management solution:

- Infor EAM 8.3 (or later) Enterprise Edition

Getting Started

Starting the Tablet Application

The installer places a shortcut to ***EAM Work Management & Inspections*** at **Start > Programs > Blue Dot > Advanced Mobile Work Management**.



Windows Programs & Shortcut Icons

☞ To start, select the **Programs** icon or the **Shortcut** icon

NOTE: It is recommended that you COPY (DO NOT MOVE) the ***Advanced Mobile Work Management*** icon from the ***Programs*** menu to the desktop for ease of use.

- ☞ A splash-screen titled **Work Management & Inspections** should appear within 10 seconds

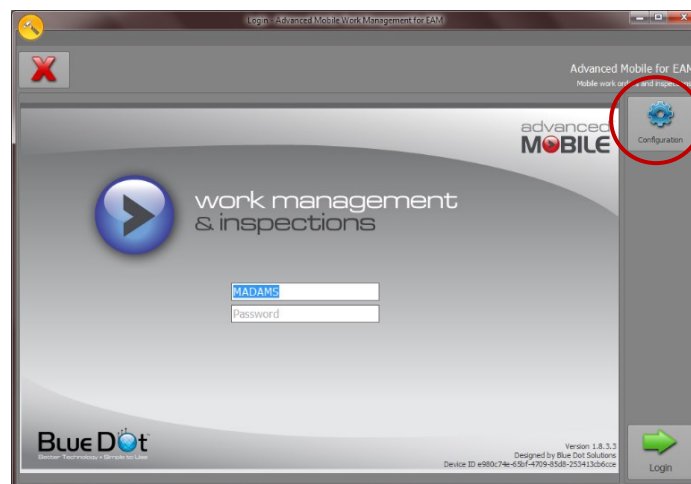


Work Management & Inspections Splash Screen

Configuration

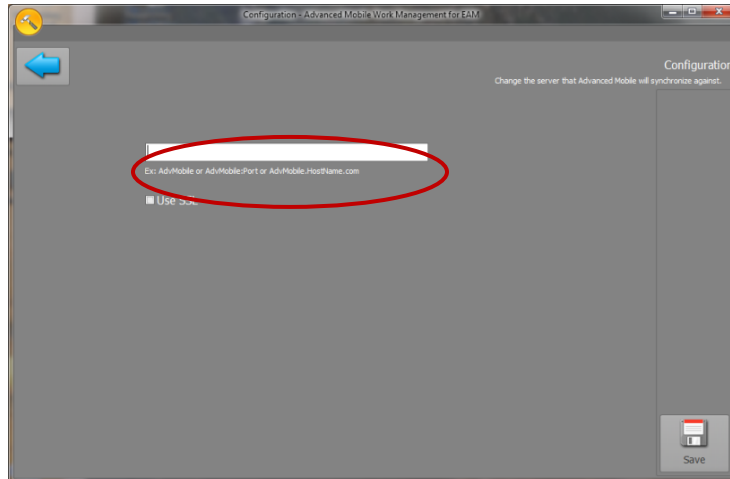
Your device may not be initially configured to connect to your company's **EAM Main Server**, and you may therefore need to input / change your configuration.

- ☞ At startup, select the **Configuration** button



Configuration Access

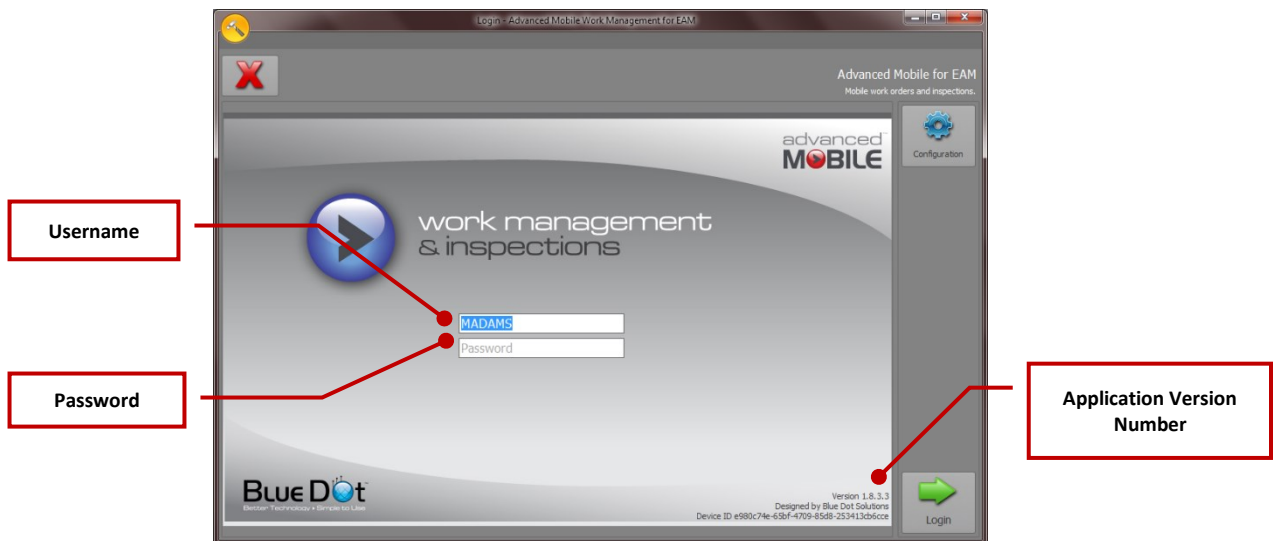
- ☞ Verify and update your server connection setting with your System Administrator and input this in the **Server** field



Server Connection Value

User Login

- When the **Login** screen appears, use the same credentials to log into the tablet application as used to log into **Infor EAM**



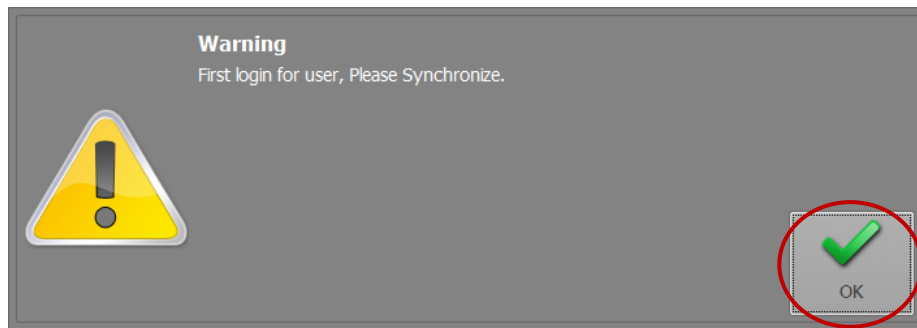
Work Management Login Screen

Notes on Authentication Usage

- Credentials are authenticated against the **Infor EAM** server, so the device must be connected to the network the first time a user logs into the device
- In most cases you do not need to add the Domain to your credentials
- Successfully authenticated credentials are stored securely on the device for use in authentication when an active network is not available
- Any time a user's credentials change in **Infor EAM**, the device must be connected to the network in order to authenticate the user and store the updated credentials on the device
- Failure to do so can result in the rejection of all submitted transactions

First Time Login and Initial Synchronization

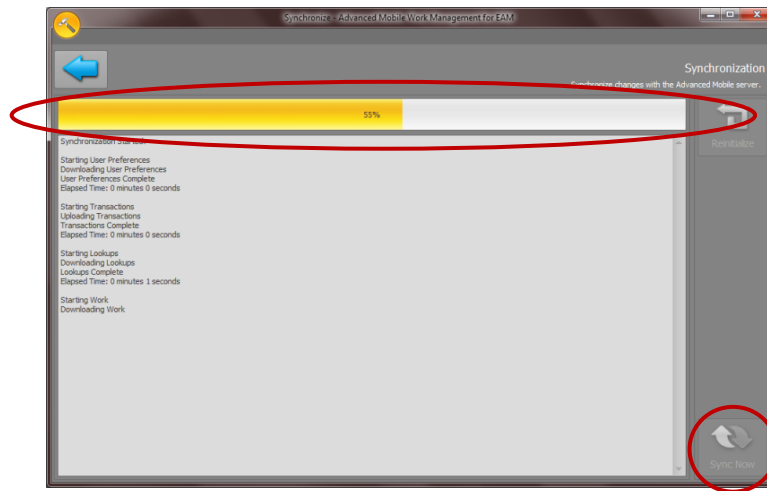
- ☞ If this is the first time you have logged in with these credentials, the system will prompt you with a synchronization request warning



First Login Synchronization Screen Prompt

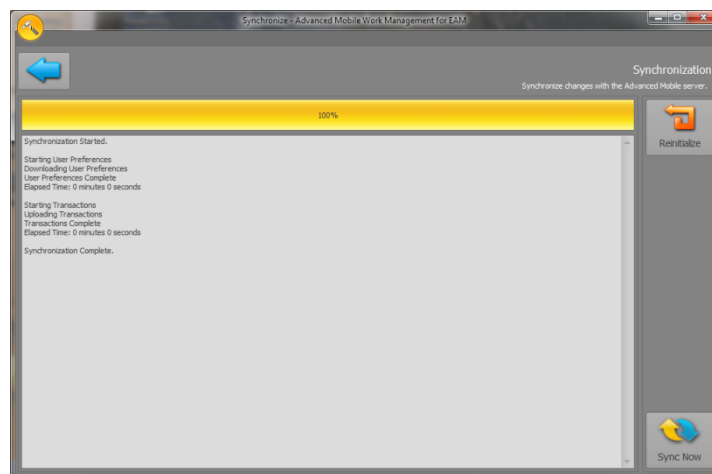
- ☞ Select the **OK** button to proceed

- ☞ Wait for the **Synchronize** process to begin automatically, as indicated by the **yellow progress bar**



Synchronize Screen


- ☞ If the synchronization does not start automatically, select the **Sync Now** button
- ☞ Once synchronization is complete, you should see the following screen

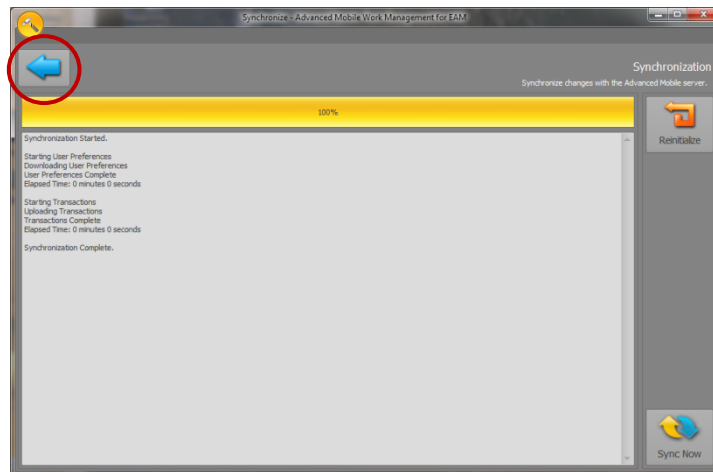


Synchronize Complete

NOTE: For details on all synchronization features, please refer to **Synchronization / Reinitialization** on page 132

Backwards Navigation

- ☞ When synchronization is complete, select the **Back** button () to return to the **Work Order Main Screen**



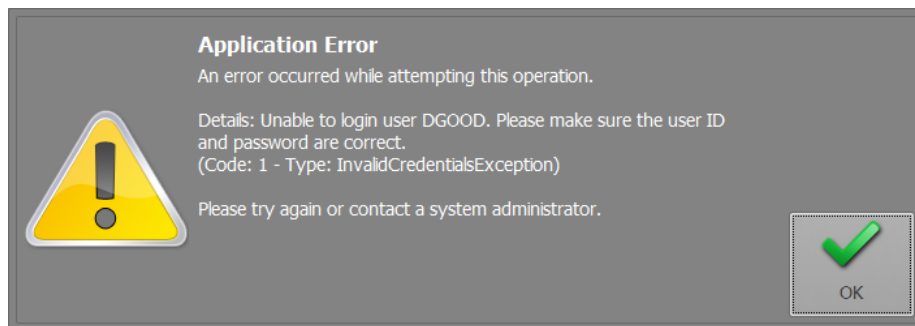
Using the Back Button

Successful Login

- ☞ A successful login will allow you to view Work Orders for that user
- ☞ Proceed to the **Basic Work Management Application** section on page 15

Login Error

- ☞ If you see the following **Login Error** screen, try to log in again or contact your System Administrator

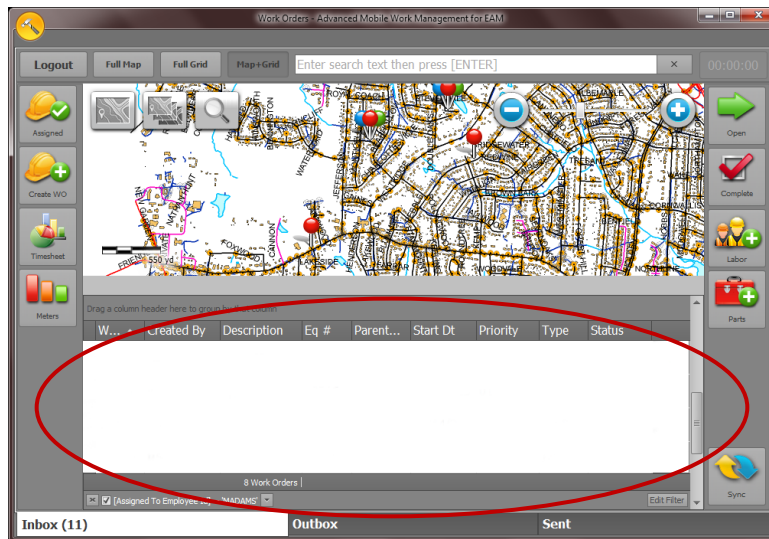


Work Management User Login Failure

Basic Work Management Application Functionality

Initializing / Re-Initializing the Database

- ☞ Upon logging in, the **Work Order Summary** screen may be empty



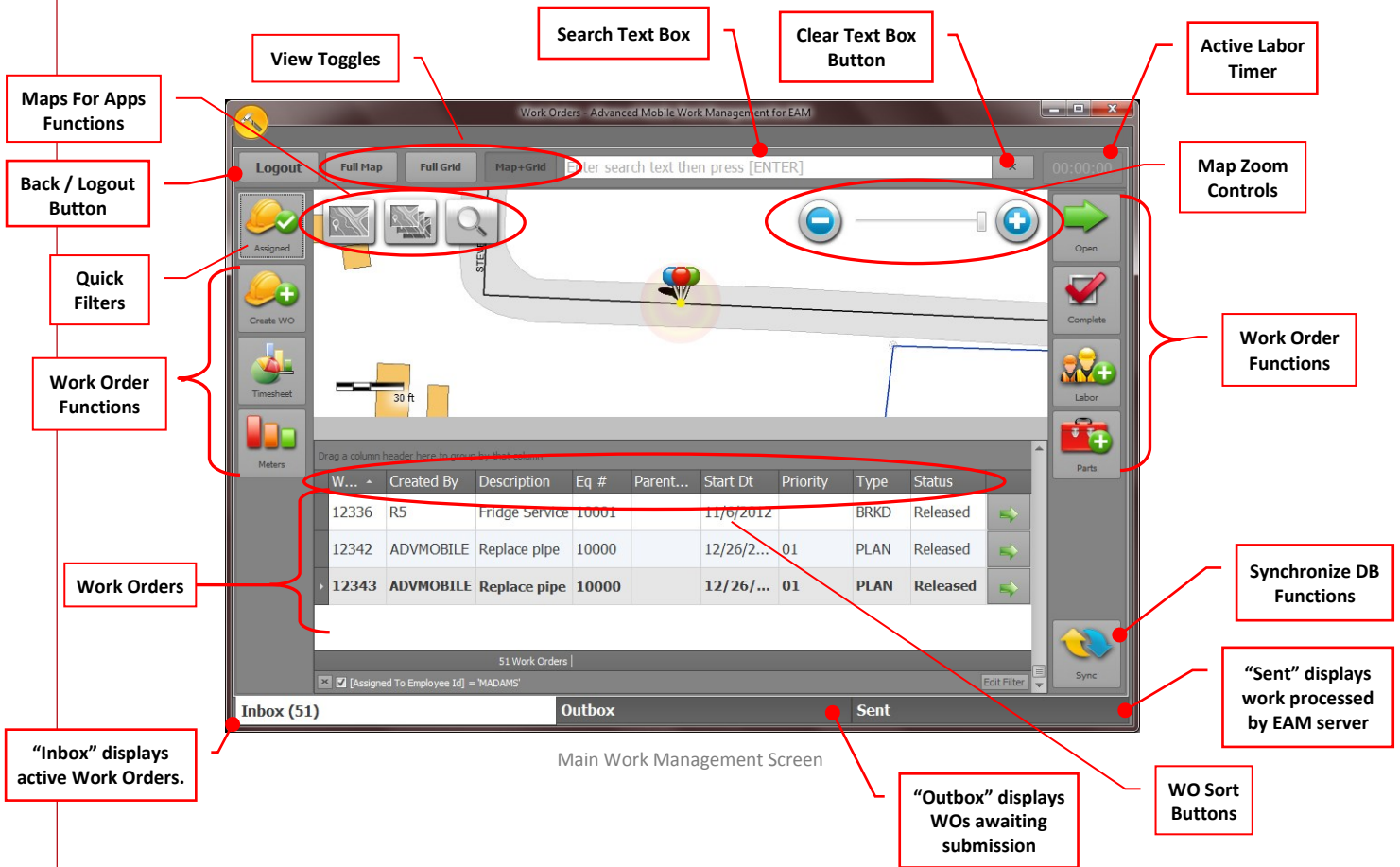
Empty DB Requiring Initialization

- ☞ This indicates that it may be necessary to synchronize or reinitialize the device's local database

NOTE: Please see section **Synchronization / ReInitialization** on page 132 for details

Main Screen

Once you have been successfully authenticated, the **Inbox** tab will be displayed and any pending Work Orders listed



Logging Out

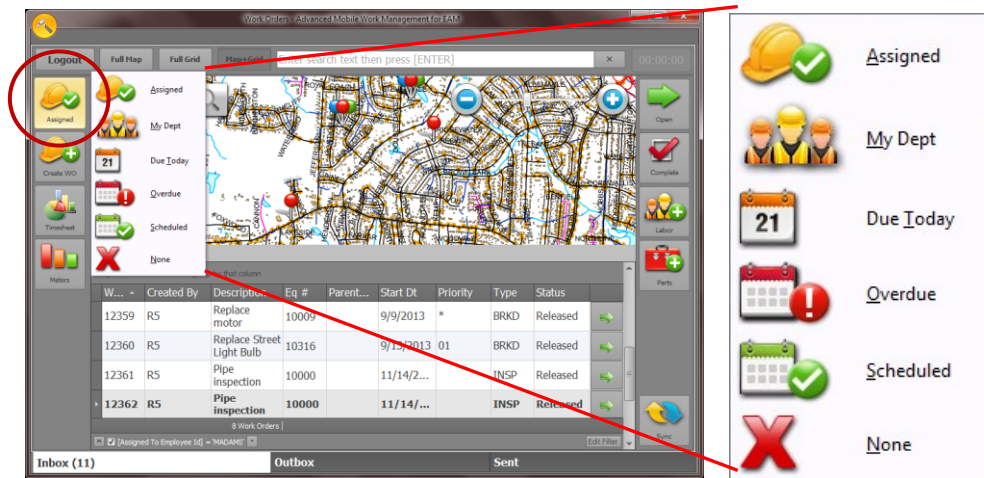
The **Back / Logout** button ( & **Logout**) in the upper-left-hand corner allows you to go back one screen

OR

If you are at the **Work Order Management Main Screen**, you will log out of the application entirely and return to the **Workflow Login Screen**

Quick Filters

☞ To filter the list of Work Orders based on pre-defined criteria



Default Filters & Additional Filtering Options

☞ Select any of the five available options to change the sort order:

- **Assigned** – Lists only Work Orders assigned to the logged in user
- **My Dept** – Lists only Work Orders in the users department
- **Due Today** – Lists only Work Orders with a scheduled **Start Date** of today
- **Scheduled** – Lists only Work Orders scheduled for the logged in user
- **None** – Removes all filters and displays all Work Orders available to the system

GIS (Map Interface)

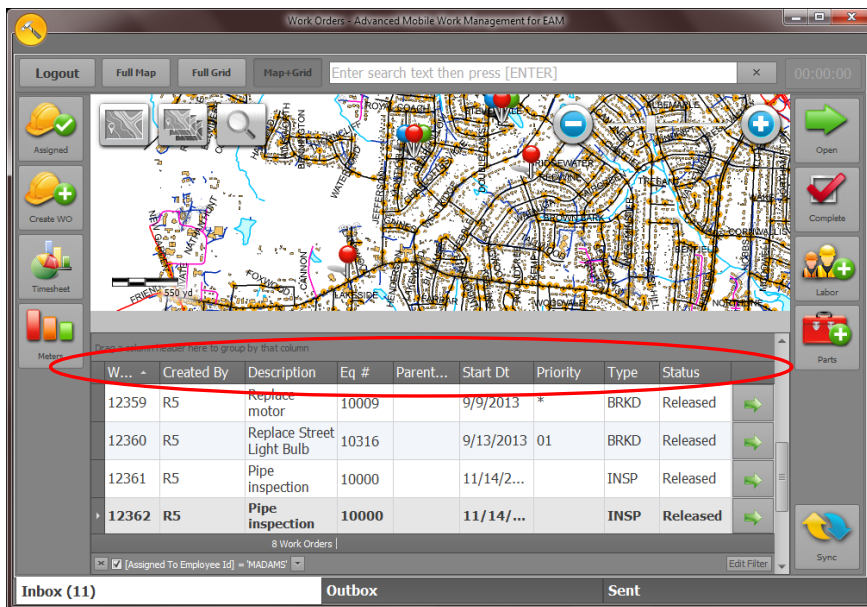
☞ See **Working with GIS** on page 105

Sorting

☞ Selecting the following Work Order column headers will sort Work Orders displayed based on that field in ascending or descending order

- **WO#** (Work Order numbers)
- **Created By**

- **Description**
- **Eq#** (Equipment Numbers)
- **Eq Org** (Equipment Organization)
- **Start Dt** (Start Date)
- **Type**
- **Status**

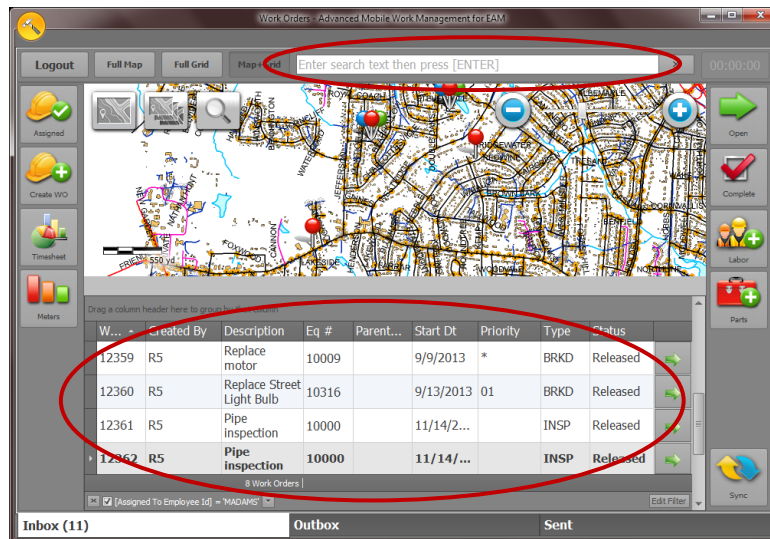


Sort Functions

☞ Selecting the same **Work Order Column Header** a second time will reverse the sort order of that column

Text Box Search / Filtering

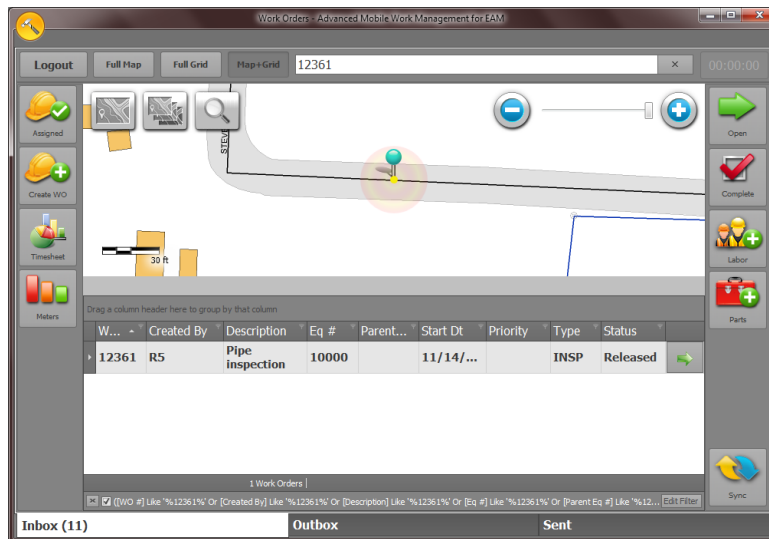
- The **Search** text box acts as a search function allowing you to filter the records displayed



Text Box Default Search

- The following fields are automatically filtered on when you type anything in the **Search** text box:
 - WO#** (Work Order numbers)
 - Created By**
 - Description**
 - Equip#** (Equipment Numbers)
 - Parent**
 - Start Dt** (Start Date)
 - Priority**
 - Type**
 - Details**
- In the example above, an empty **Search** text box displays all available Work Orders for a total of nine

- ☞ Typing in the characters '12332' and pressing ENTER filters out the all records but the single Work Order



Default Work Order Screen

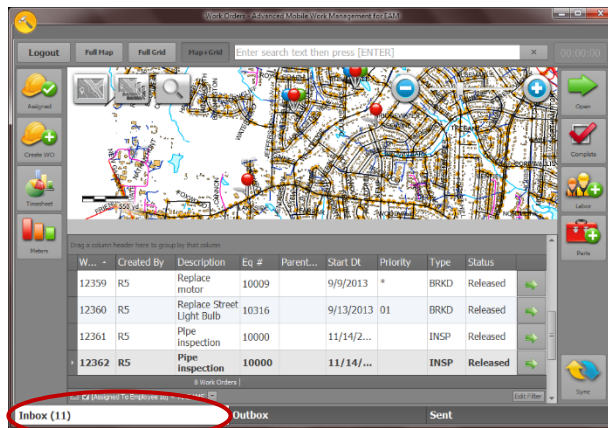
- ☞ Selecting the **X** button () will clear anything in the **Search** text box
- ☞ Pressing enter will re-query the list of available Work Orders

Scanning Equipment IDs

- ☞ Tablets equipped with a barcode scanner can scan the **Equipment ID** directly into the device to search existing Work Orders

Work Order Inbox Tab

The **Inbox** tab is the default tab/view and displays all active Work Orders



Inbox Tab

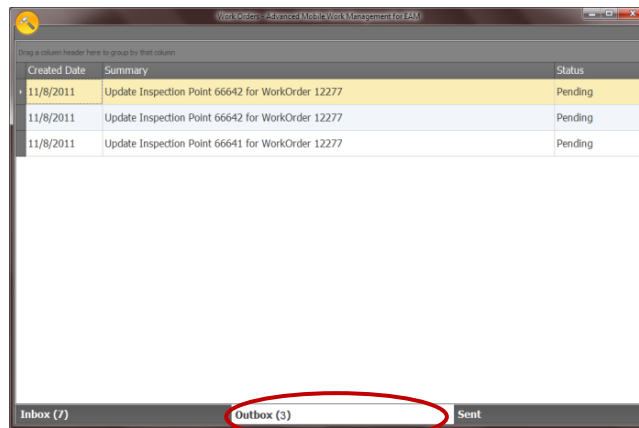
Selecting a specific Work Order will allow you to work with it

NOTE: Any active searches or filters will remain until you manually remove them

Work Order Outbox Tab

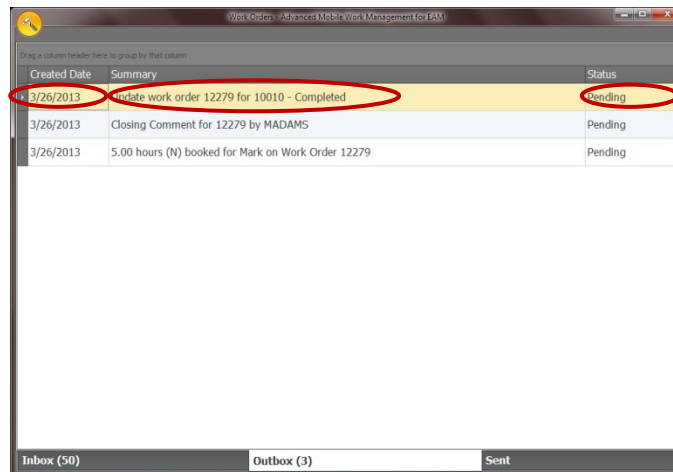
The **Outbox** tab displays completed (closed) Work Orders awaiting processing

- Select the **Outbox** tab to see all Work Orders that are currently in queue to be synced up with the **EAM Main Server**



Outbox Tab

- The Work Orders displayed can be sorted on each of the three column-headers: **Create Date, Summary & Status**

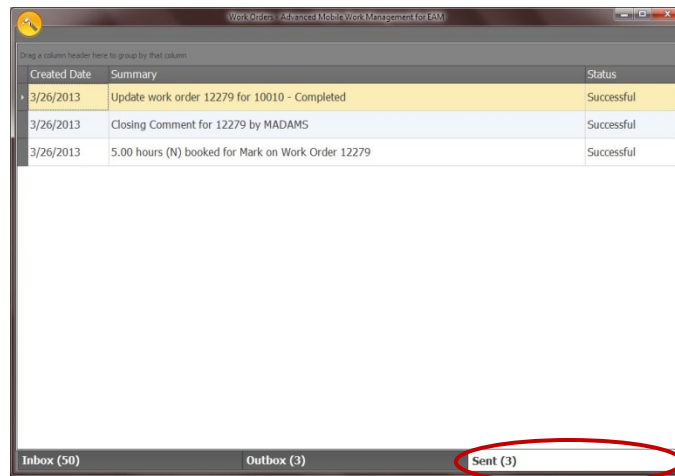


Outbox Sorting Columns

- You may select the **Synchronize** function to process all existing Work Orders
- Work Orders in the **Outbox** tab cannot be edited

Work Order Sent Tab

☞ The **Sent** tab shows all closed and submitted Work Orders



Created Date	Summary	Status
3/26/2013	Update work order 12279 for 10010 - Completed	Successful
3/26/2013	Closing Comment for 12279 by MADAMS	Successful
3/26/2013	5.00 hours (N) booked for Mark on Work Order 12279	Successful

Inbox (50) Outbox (3) **Sent (3)**

Sent box Tab


NOTE: *Sorting is available for each column header*

☞ The Work Orders displayed can be sorted on each of the three column-headers:

- **Created Date**
- **Summary**
- **Status**

☞ Work Orders in the **Sent** box tab cannot be edited

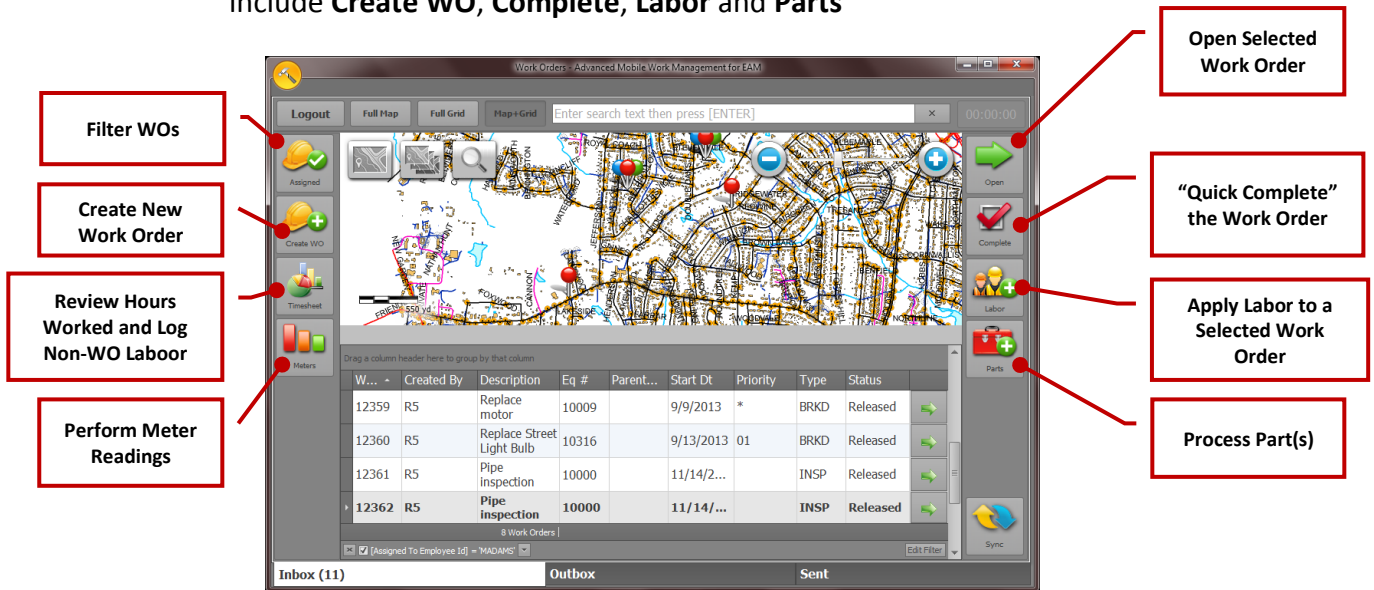
Navigation

☞ The **Back / Logout** button () in the upper-left-hand corner allows you to go back one screen or, if you are at the **Work Order Management Main Screen**, to log out of the Work Management application entirely and return to the **Workflow Login Screen**

Quick Work Order Processing

Work Order Quick Complete Options

The **Quick Complete** options are on the right-hand side of the interface and include **Create WO, Complete, Labor and Parts**



Work Order Processing Options

NOTE: Some of these functions may not be available as a result of your company's system configuration. All available features are show here for example purposes, but it is likely that one or more of these buttons will not be displayed on your device. Contact your system administrator should you have any questions.

- **"Filter"** – Filter the available Work Order by different categories
- **Open** – Opens the selected Work Order
- **Create WO** – Creates a new Work Order (see **Creating Work Orders** on page 105 for details)
- **Complete** – Allows the user to "quick complete" the Work Order by entering a short list of key fields (see **Completing Work Orders** on page 25 for a detailed explanation)

- **Timesheets** – The timesheet function displays all non-work -order-related labor booked by the user within a given time span.
(see **Timesheets** on page 29 for a detailed explanation)
- **Labor** – Applies hours worked to the Work Order
(see **Labor** on page 62 for a detailed explanation)
- **Meters** – Perform ad hoc meter readings on equipment
(see **Ad Hoc Meter Reading** on page 38 for a detailed explanation)
- **Parts** – Includes specific information regarding the part(s) used to complete the job
(see **Parts** on page 65 for a detailed explanation)

Opening the Detailed View

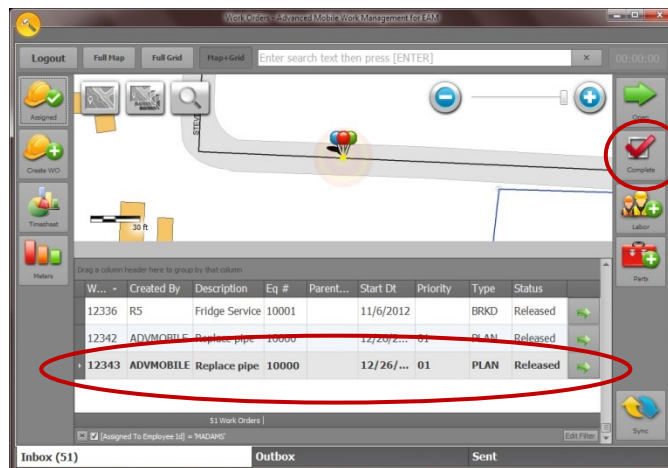
- **Open** – Opens a detailed Work Order processing interface
(see **Detailed Non-Inspection Work Order Processing** on page 55 for a detailed explanation)

Creating Work Orders

- ☞ Please see **Creating Work Orders** on page 105 for detailed information

Completing Work Orders

- ☞ Select the Work Order to be processed



Selecting A Work Order

Select the **Complete** button to open the **Quick Complete** interface

NOTE: Please see section **Completing Work Orders** on page **82** for additional information

The Work Order Quick Complete Screen

Enables users to input a basic list of required data necessary for the closure of a ticket

The screenshot shows the 'Complete Work Order' screen with the following callout boxes:

- Quick Select List**: Points to the top right navigation area.
- Cause Code List**: Points to the 'Cause Code' dropdown menu.
- Take Pictures**: Points to the camera icon.
- Action Code List**: Points to the 'Action Code' dropdown menu.
- Enter Numerals**: Points to the 'Downtime Hours' input field.
- Service Report**: Points to the 'Service Report' button.
- Save & Close**: Points to the 'Save & Close' button.
- Closing Comments Regarding the Final Work**: Points to the 'Closing Comment' text area.
- Time Tracking (Worked & Down Time)**: Points to the 'Hours Worked' input field.

Quick Closure Screen

Select or enter a **Work Order Closing Comment**

NOTE: The Standard Comment drop-down is populated from the EAM Main Server

Select or enter an **Hours Worked** record against the first associated **Activity**

Enter **Hours Down**

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)
- ☞ If you need to attach a photo, click the **Camera** button to capture a photo

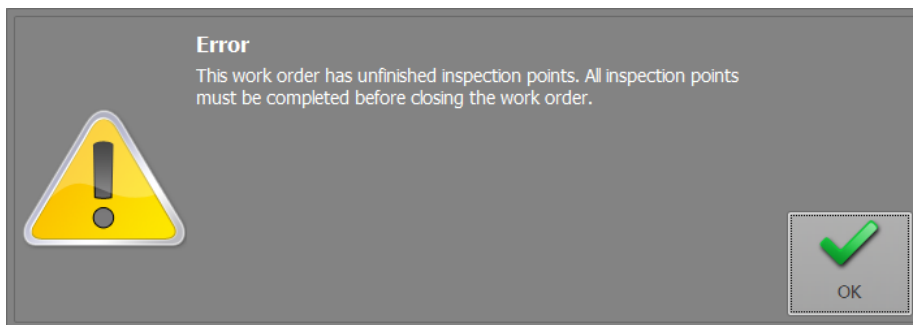
NOTE: *The camera software from one device to the next is different, so these steps are not details here. Please see your manufacture's user guide for how to use the camera on your device.*

- ☞ Select **Save & Close**

NOTE: *When the **Save** button is pushed, the Work Order updates are submitted if an active network connection is available or stored locally to be submitted later*

Inspection Incomplete Warning


- ☞ If you attempt to **Complete** and close out the Work Order without addressing all inspection points, you will be prompted with an **Inspection Incomplete Warning**

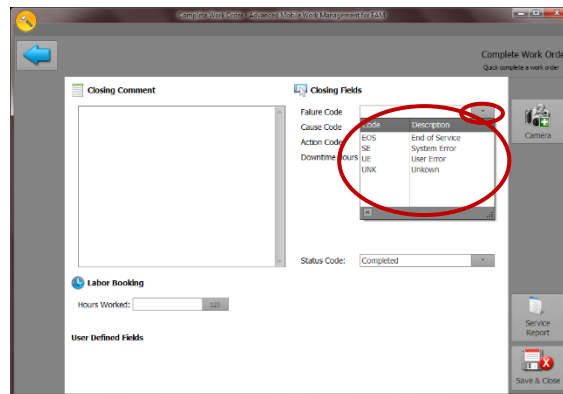


Inspection Incomplete Warning

- ☞ See **Detailed Inspection Processing** on page **96** for more info

Using the Quick Select Function


☞ Selecting a **Quick Select Button** () exposes pre-defined responses

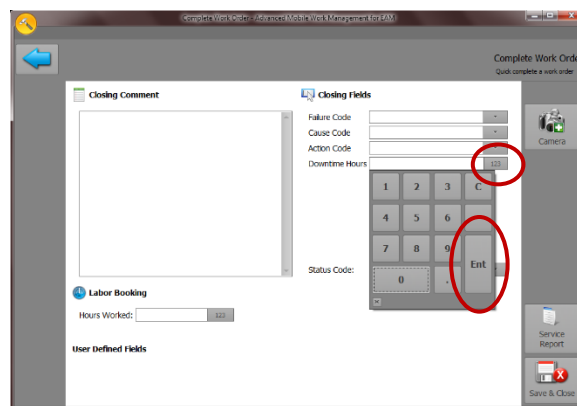


Quick Select Functionality

☞ Select the **Value** you want

Using the Number Pad

☞ Selecting the **123 Button** () will always open an interface that allows you to more easily input numbers via the UI rather than device buttons



Calculator Functionality

☞ Hitting the **Ent** button will submit the numeric value into the active field

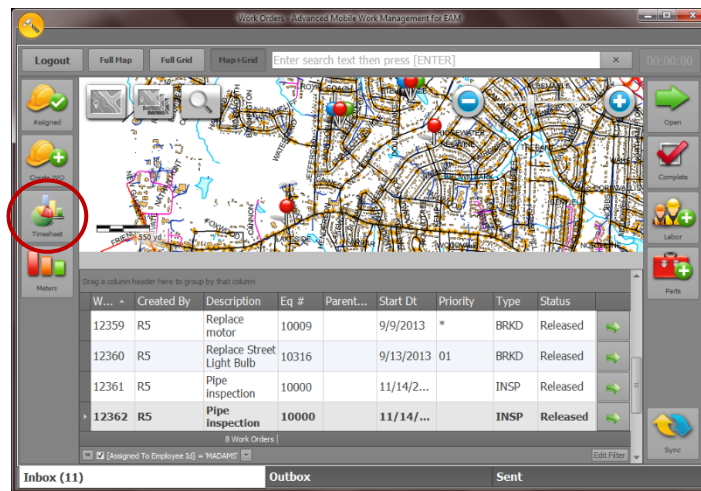
Service Report

☞ See **Service Reports** on page **92** for details on this function

Timesheets

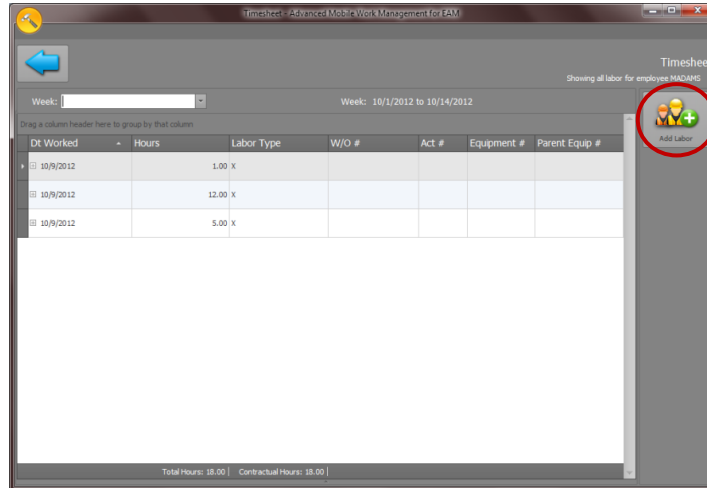
For tracking purposes, users can log time without having to associate that time to a specific Work Order.

☞ To log time or review entries, click the **Timesheet** button



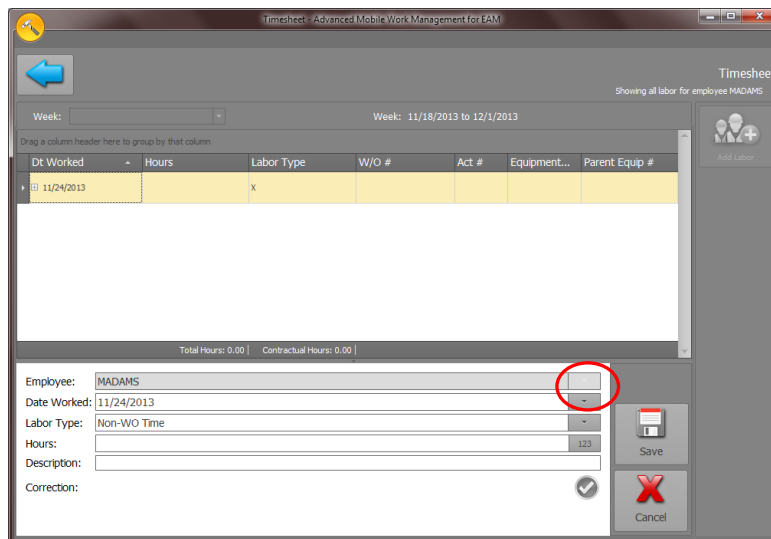
Timesheet Button

☞ Review the list of logged time entries as needed



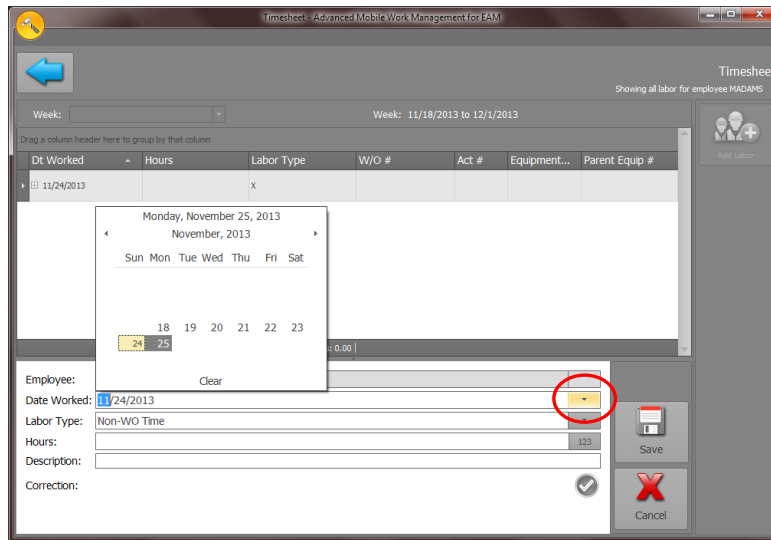
Add Labor Button

Click the **Add Labor** button to make a new entry



Timesheet Labor Entry

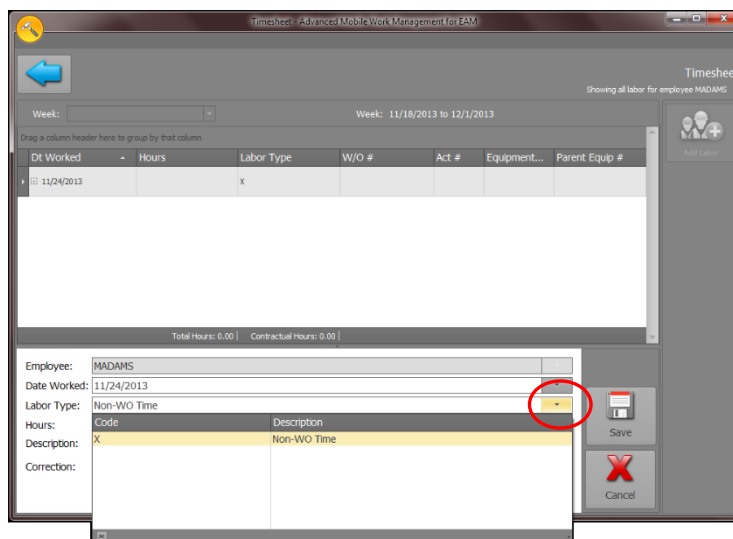
☞ Click the **Date Worked** arrow and select the correct date



Timesheet Labor Date Selection

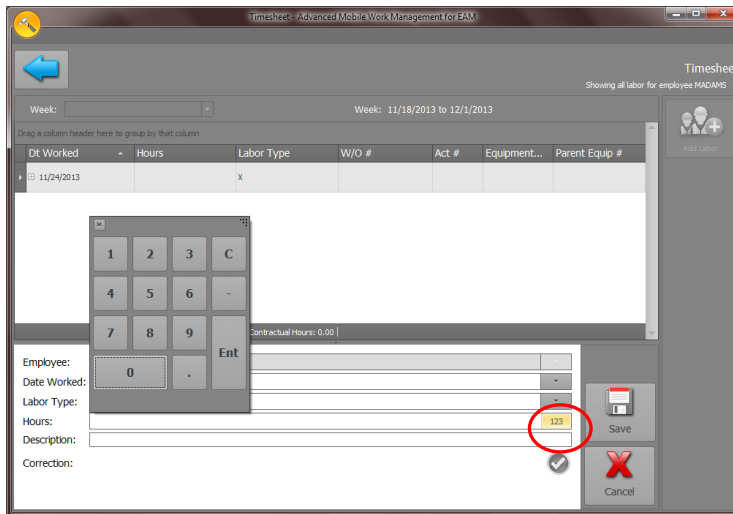
NOTE: You cannot select dates in the future

☞ Click the **Labor Type** arrow to specify what sort of time was spent



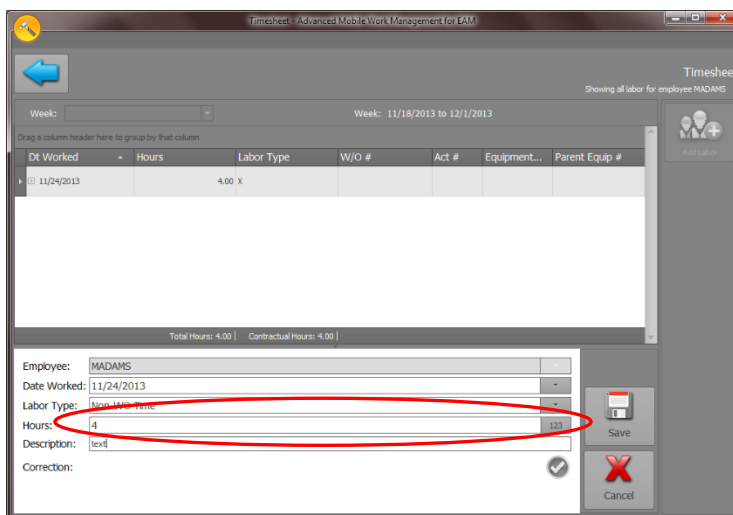
Timesheet Labor Type

Click the **123** button to specify the time to be applied



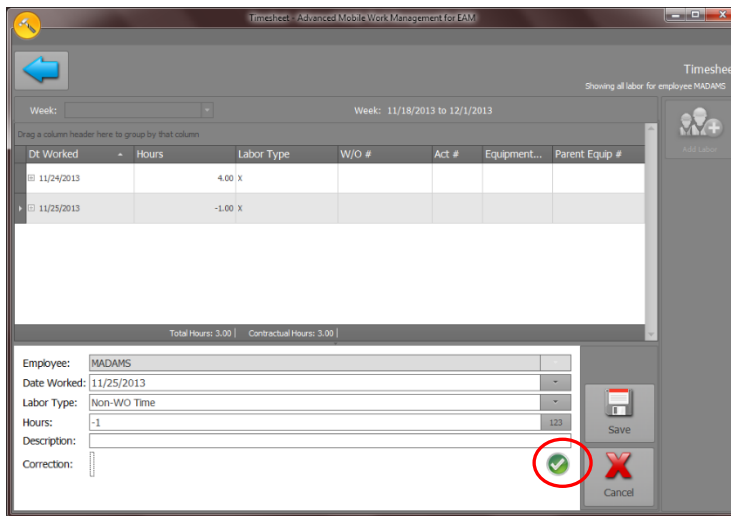
Timesheet Hours Logged

Enter a description as needed to clarify what the time was for



Timesheet Labor Description

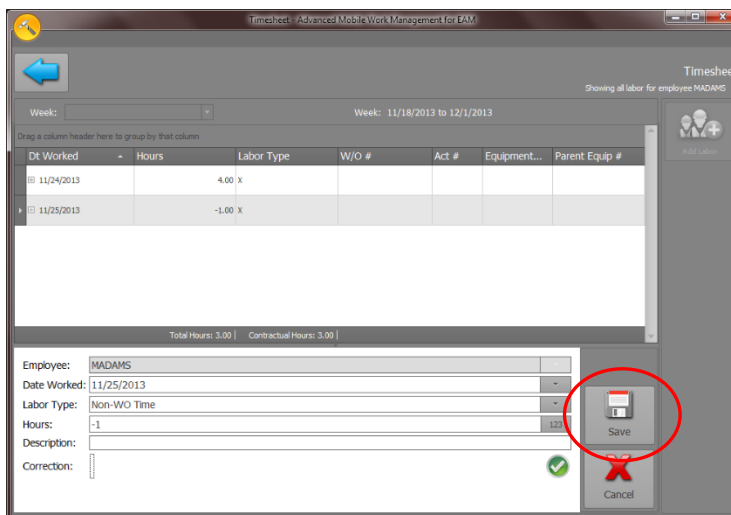
- ☞ If this is a correction of Labor hours applied (subtracting from overall labor performed), click on the gray checkbox for this labor entry



Timesheet Labor Correction Checkbox

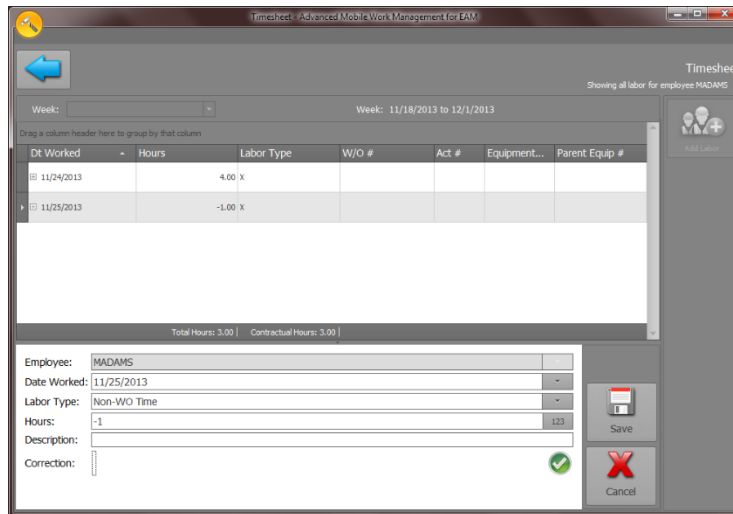
NOTE: The button will turn green when it is selected, and any time logged with this function on will be DEDUCTED from the overall time allotted to the user

- ☞ When all fields are complete, click the **Save** button to log the labor



Timesheet Labor Save Button

☞ The labor will be logged and the user returned to the Timesheet labor view

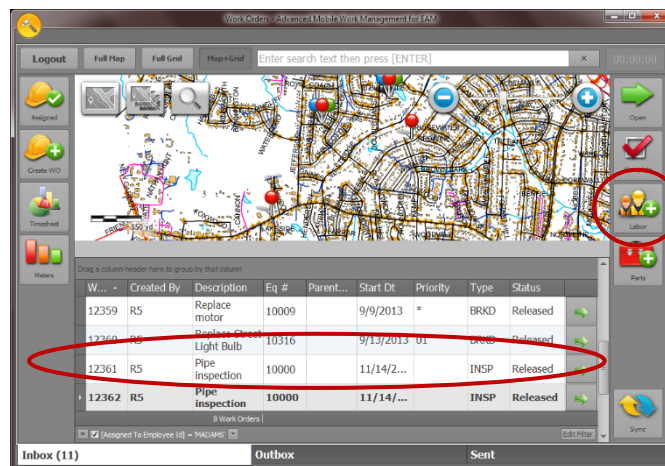


Timesheet Labor Added List


Applying Quick Labor to a Work Order

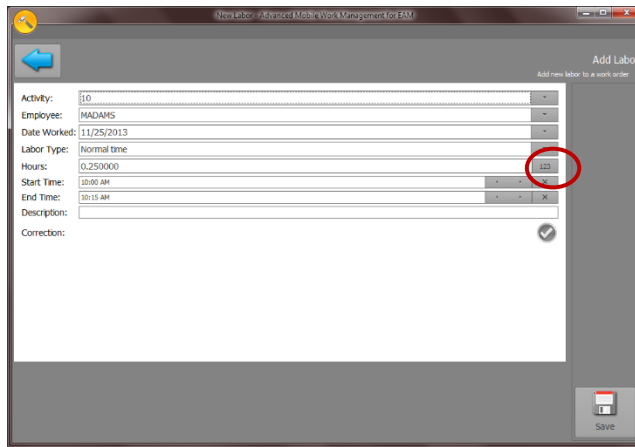
NOTE: See *Timesheets* on page 29 for logging hours without a Work Order

☞ Select the Work Order to which you want to add labor then select the **Quick Labor** button in the **Work Order Quick Options**



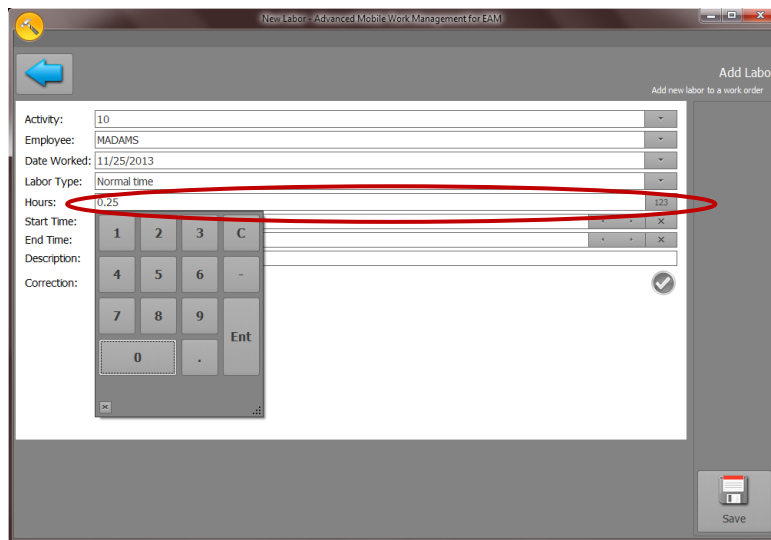
Accessing the Quick Labor Function

Click the **123 Button** () to expose the keypad




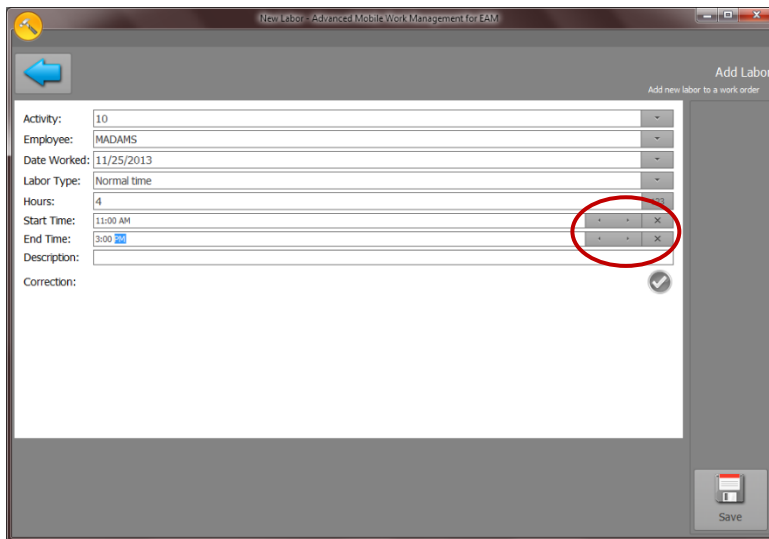
Quick Labor Screen

Enter time spent in the **Hours** field



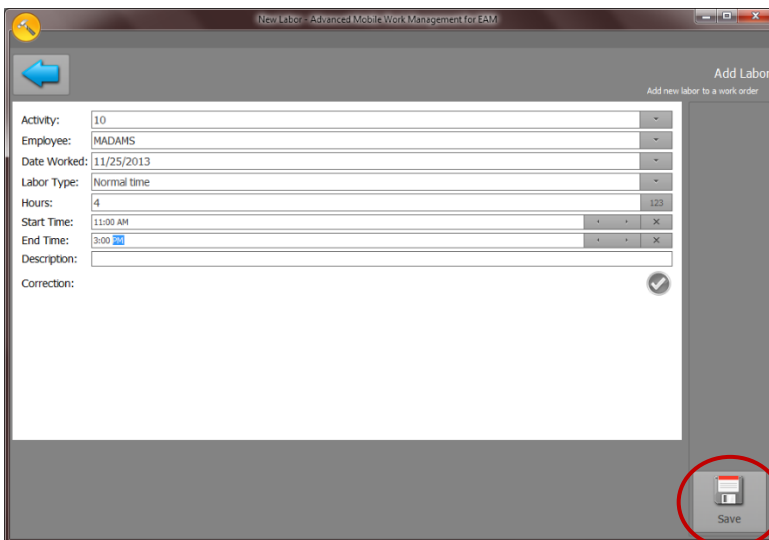
Accessing the Labor Number Pad

☞ As an option, you can set the **Start Time** and **End Time** by clicking the Left and Right arrows () for those fields.



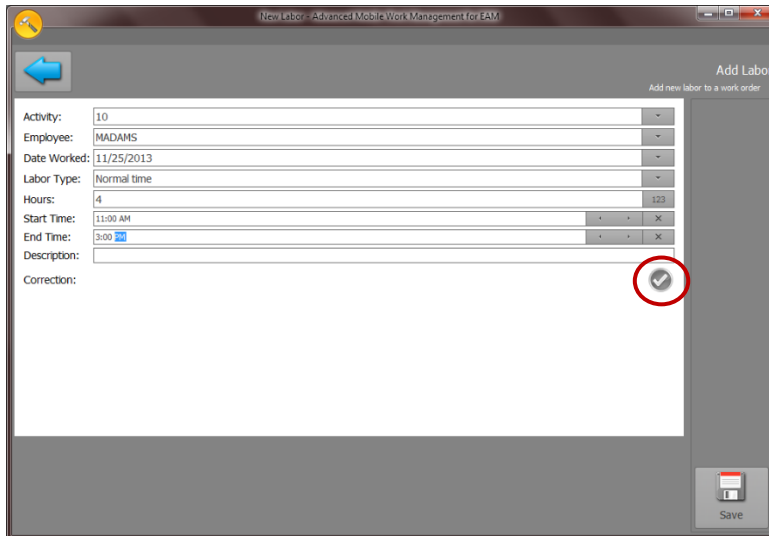
Setting the Start and End Time

☞ Select **Save**



Saving Quick Labor Time

- ☞ For *reduction* in labor, click the **Correction button** (✔) or use the device keypad to input a negative number

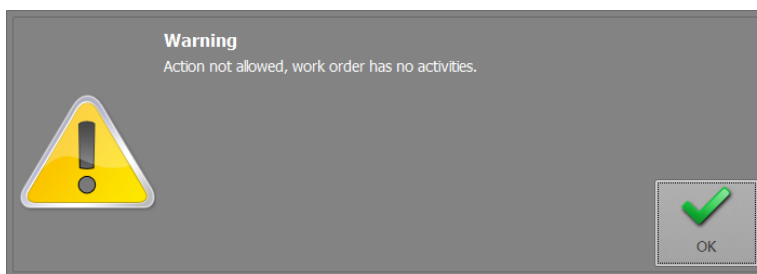


Labor Correction

NOTE: *Activity, Employee, Date Worked and Labor Type* fields should be pre-populated for you but can be altered as needed

No Activities Warning

- ☞ If you get the **No Activities** warning, you will be unable to associate labor to the ticket, and there is an issue with that Work Order

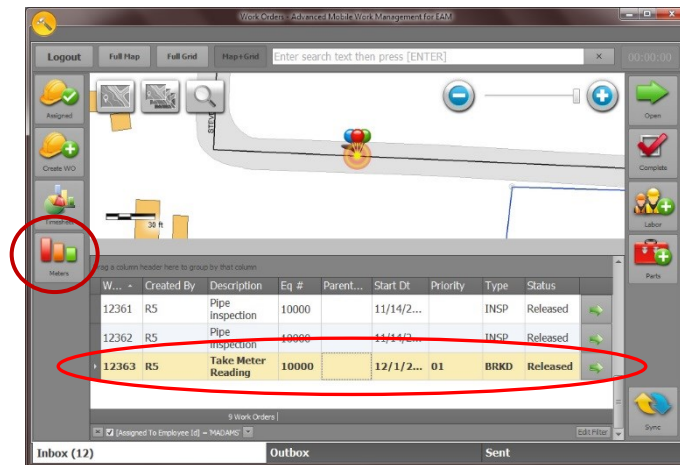


No Activities Warning Message

- ☞ Select **OK** to move on or contact your System Administrator if you feel that you should be able to associate labor to the Work Order in question

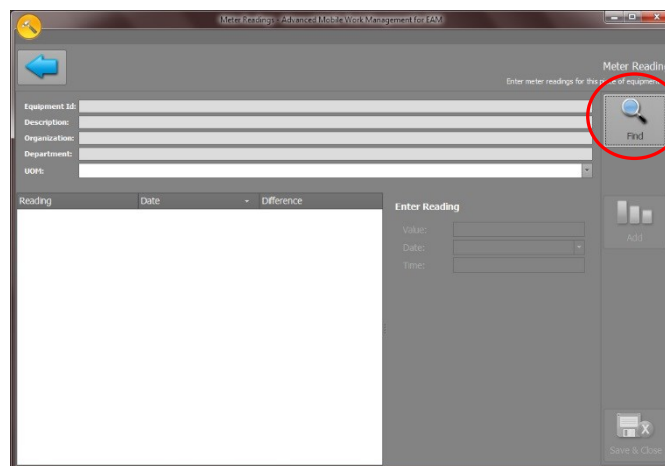
Ad Hoc Meter Reading

- Select a Work Order with an associated Meter or which needs a meter reading added



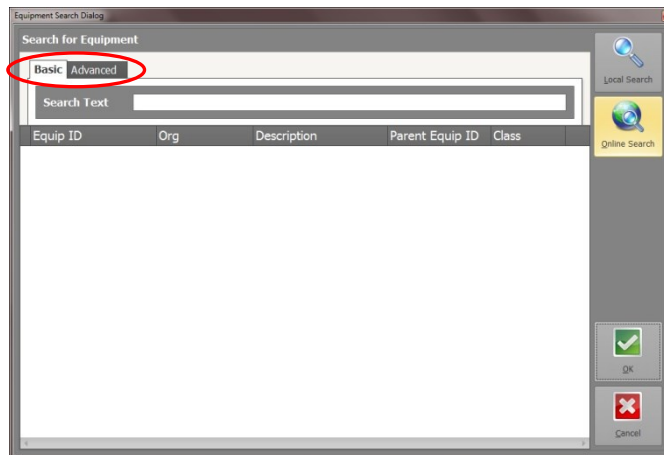
Accessing the Quick Meters Function

- Select the **Meters** button
- Select the **Find** button



Accessing the Equipment Search Function

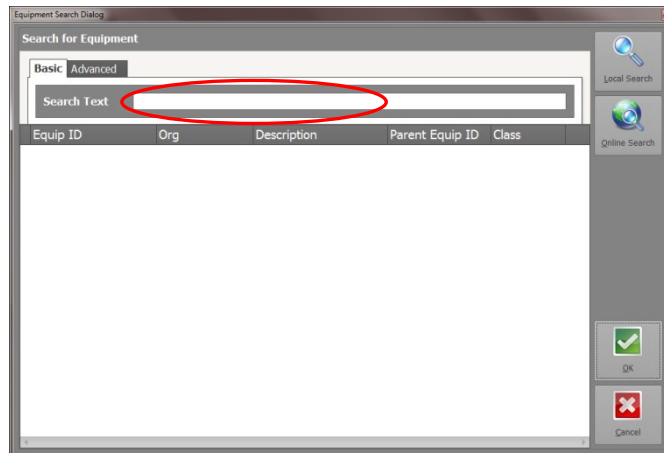
- ☞ You can perform either a **Basic Search** detailed on page 39 or an **Advanced Search** detailed on page 41



Selecting Basic or Advanced Equipment Searches

Basic Search

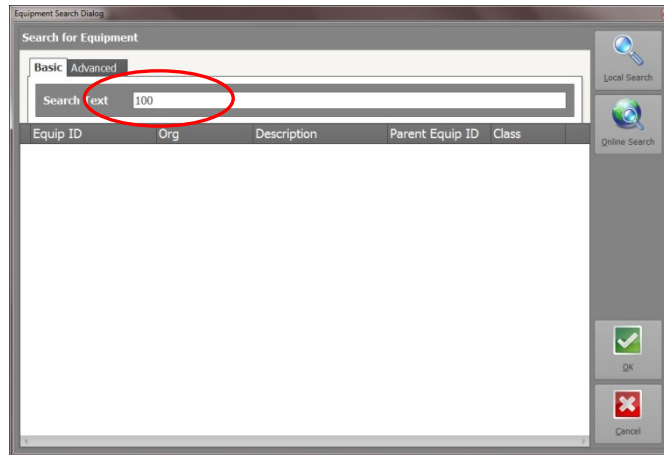
- ☞ Place the cursor in the **Search** text box and hit the **Enter** button on the device to display all **Local** equipment records



Default Full Basic Search (Local)

OR

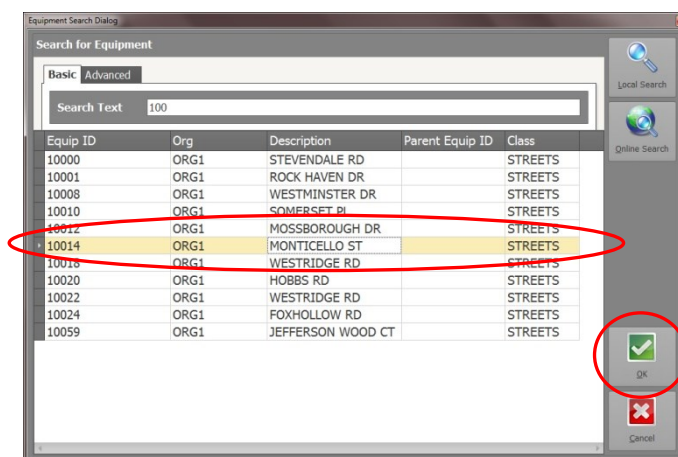
- ☞ Enter your search criteria in the **Search** text field and click the **Local Search** or **Online Search** button



Entering Partial Search Criteria

NOTE: You can enter one or more characters, and the system will display all matches

- ☞ Select the desired record from the results or perform another **Local** or **Online** search



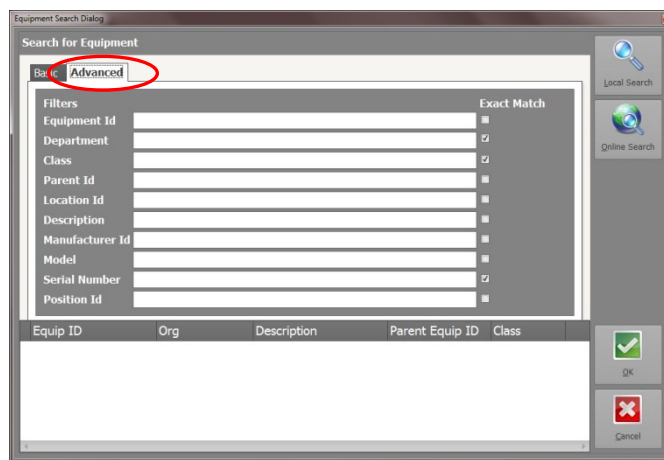
Selecting Equipment from the Search Results

- ☞ Click **OK**

- ☞ The system will return to the Meters page and auto-populate the values of your selection into the appropriate fields
- ☞ Proceed with the **Adding a Meter Reading** section on page 43

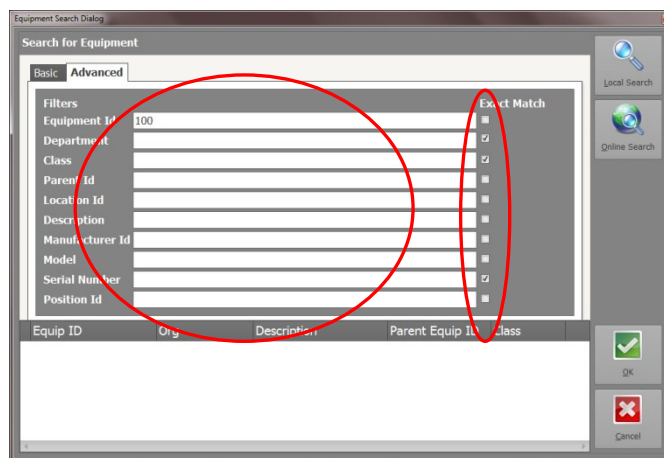
Advanced Search

- ☞ Click the **Advanced** tab



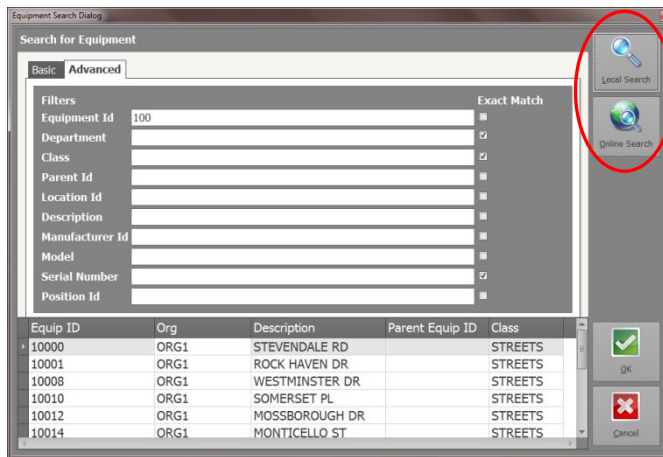
Advanced Equipment Searches

- ☞ Populate one or more of the **Advanced** search fields with the desired search criteria



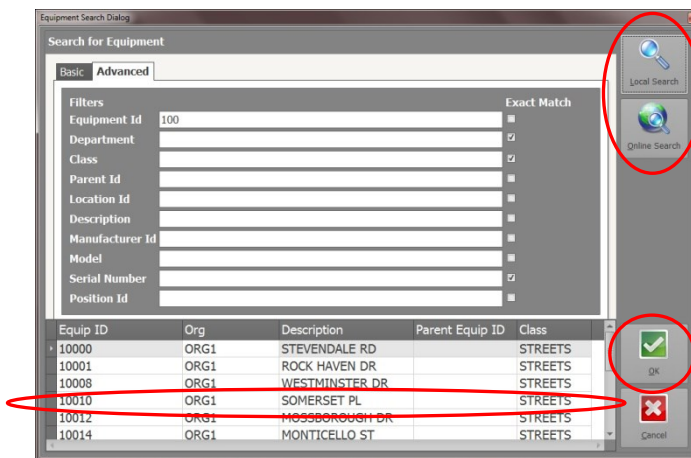
Specifying Advanced Search Criteria

- ☞ Wherever applicable, check the **Exact Match** box to limit the search results returned by the system
- ☞ Hit the **Local** or **Online** Search button



Advanced Search on Specific Criteria

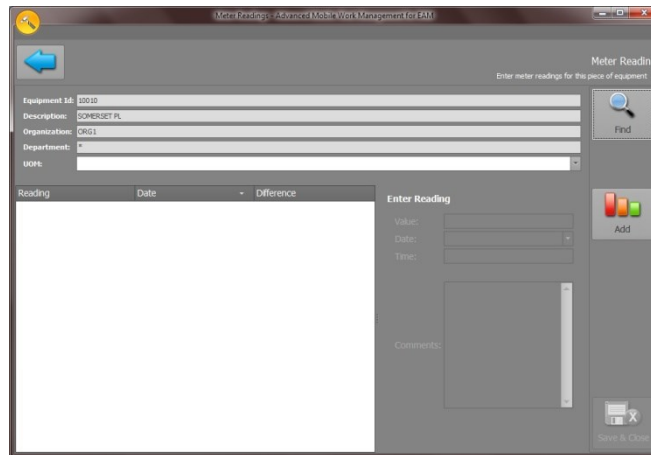
- ☞ Select the desired record from the results set or perform another search



Selecting Basic or Advanced Equipment Searches

- ☞ Click the **OK** button and the system will return you to the main **Meters** screen

➤ Proceed with the **Adding a Meter Reading** section below

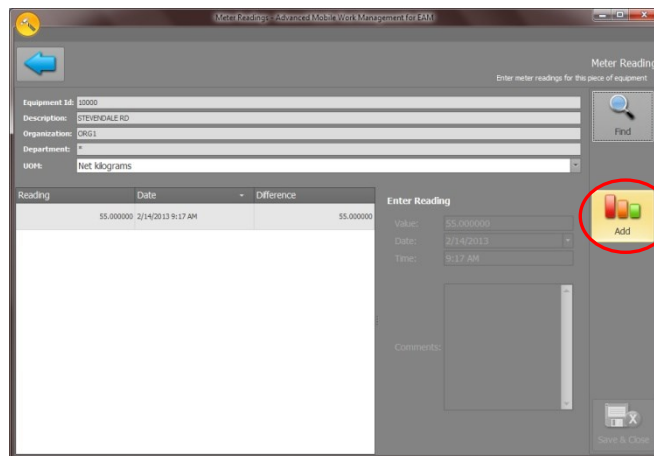


Search-Populated Equipment Selection

Adding a Meter Reading

➤ Populate the **Equipment ID** with a value that has a meter associated with it

Note: *Not all equipment will work for meter readings*

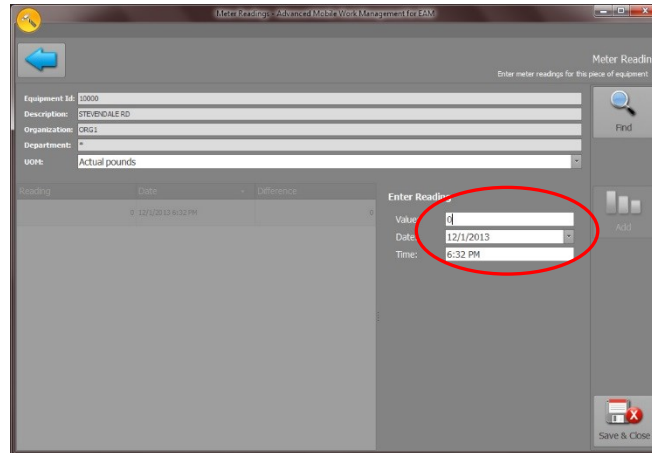


Adding A Meter Reading

➤ Click the **Add** button

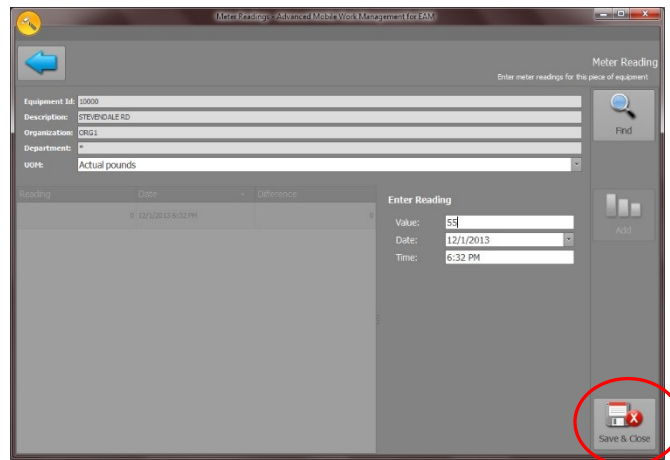
- ☞ Populate the reading **Value** and, if necessary alter the **Date** and **Time** for the reading in question

NOTE: *Date and Time default to "NOW"*



Specifying Reading Values

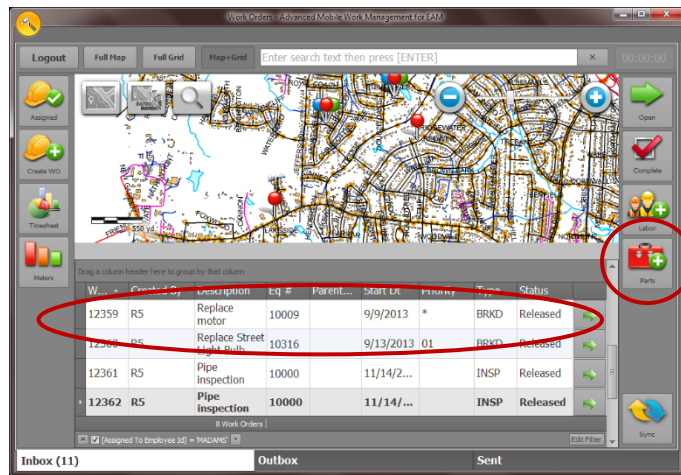
- ☞ Click the **Save & Close** button



Saving the Meter Reading

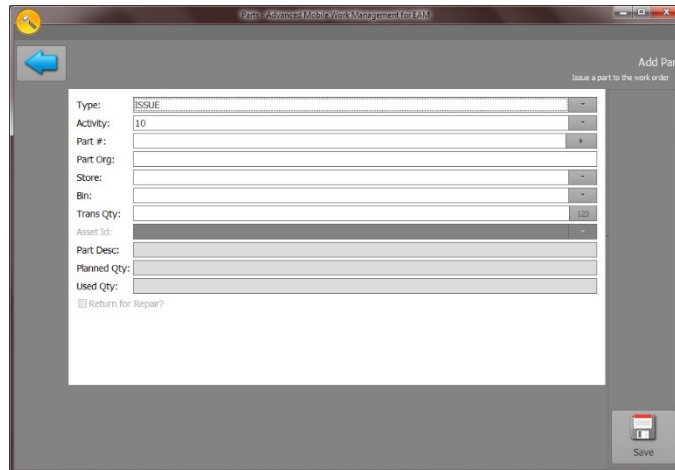
Applying Quick Parts

- Select the Work Order for which you need to add parts




Accessing the Quick Parts Function

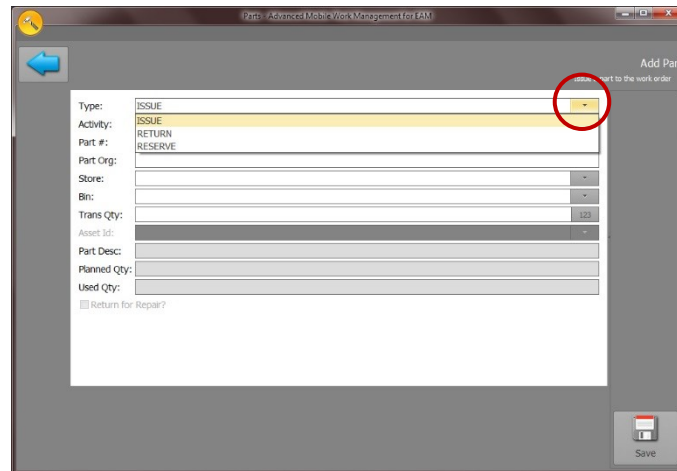
- Select the **Parts** button in the **Work Order Quick Options** to bring up the parts interface



Quick Parts Screen


Type

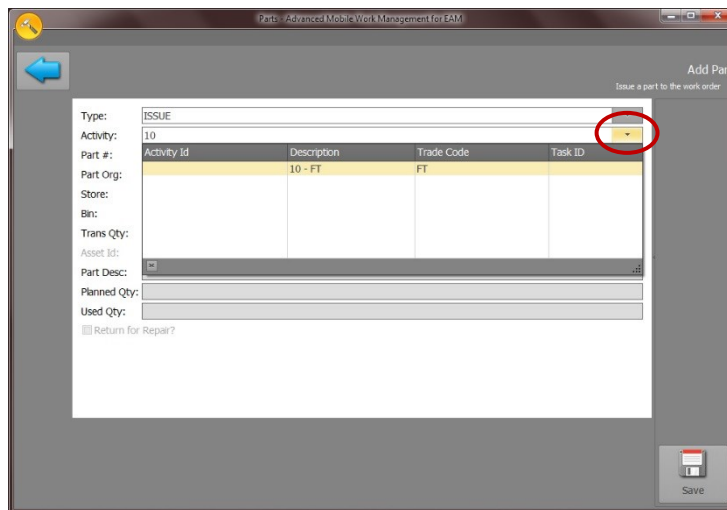
- Select the **Type** dropdown button() to specify whether the **Part Transaction Type** is an Issue, Return or Reserve



Quick Parts Type Field


Activity

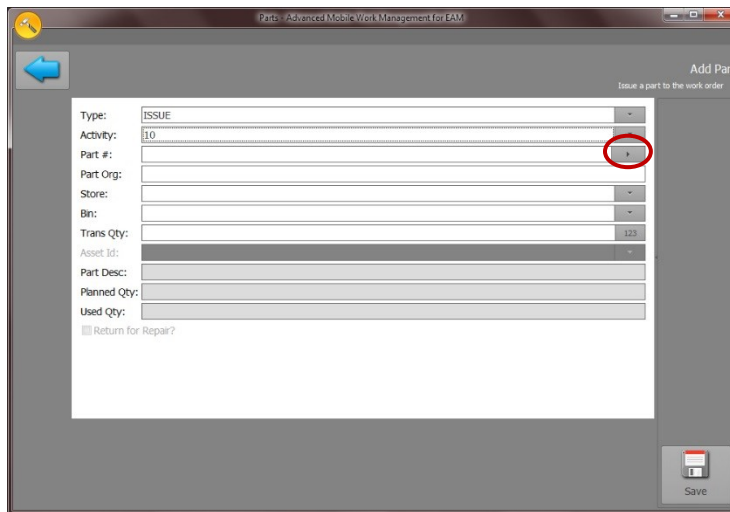
- Select the **Activity** dropdown button() to specify the **Activity** against which to issue the **Part**



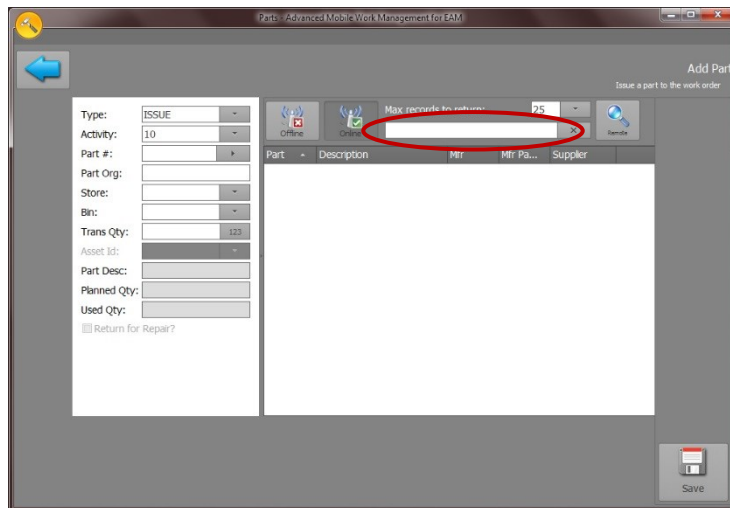
Quick Parts Activity Dropdown

Part

- Select the **Part #** dropdown button () to expose the **Part Search UI**

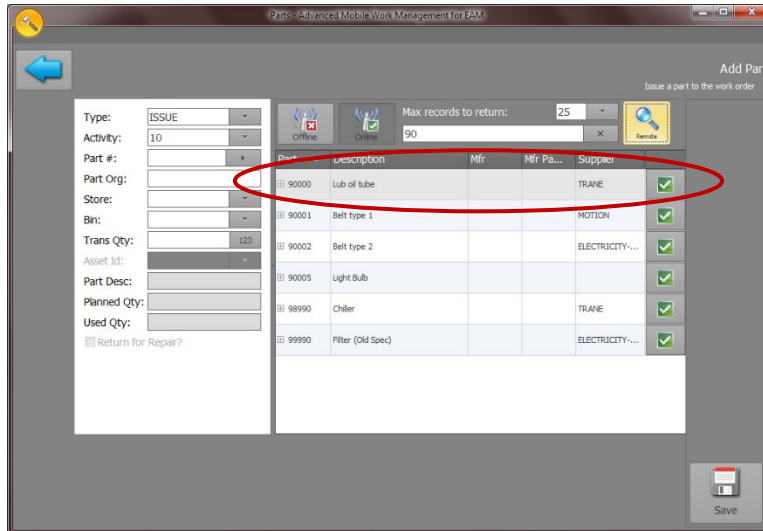


- Adjust your search with the **Offline / Online** and **Max Records** buttons



Quick Parts Part Selection

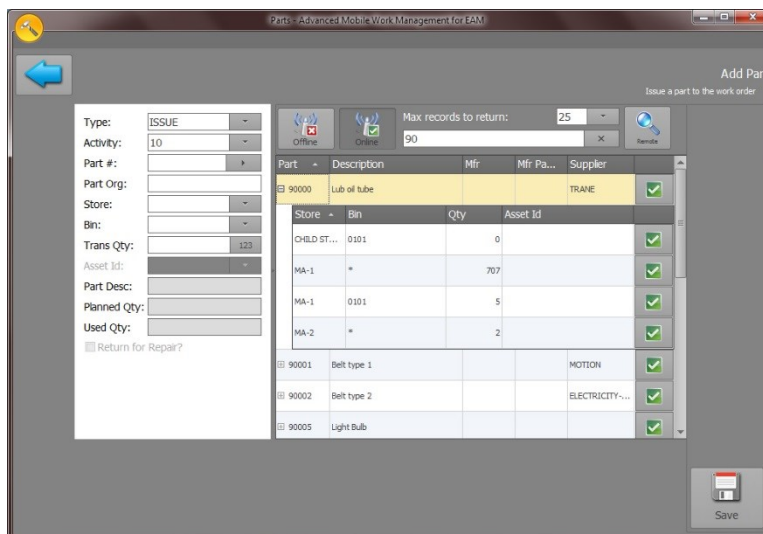
- Type some or all of the **Part Number** in the search field
- Select the **Part** you want



Part Number Selection

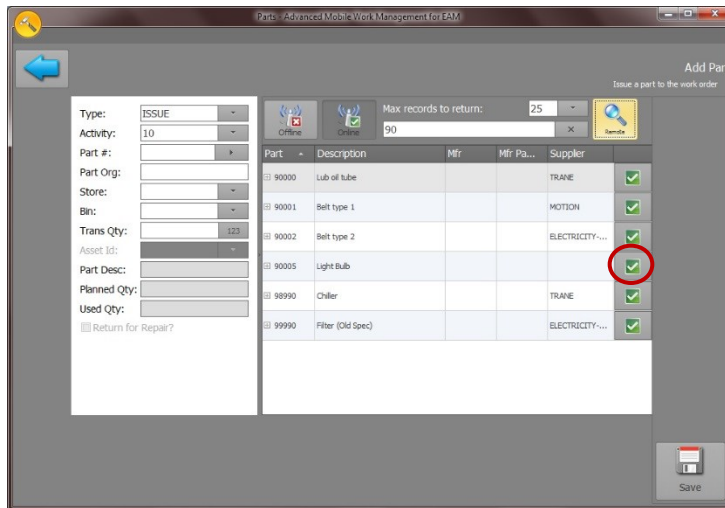
Select the **Plus** button (⊕) to expand part selection options

NOTE: There may not always be Part Selection options



Part Number Selection Step 2

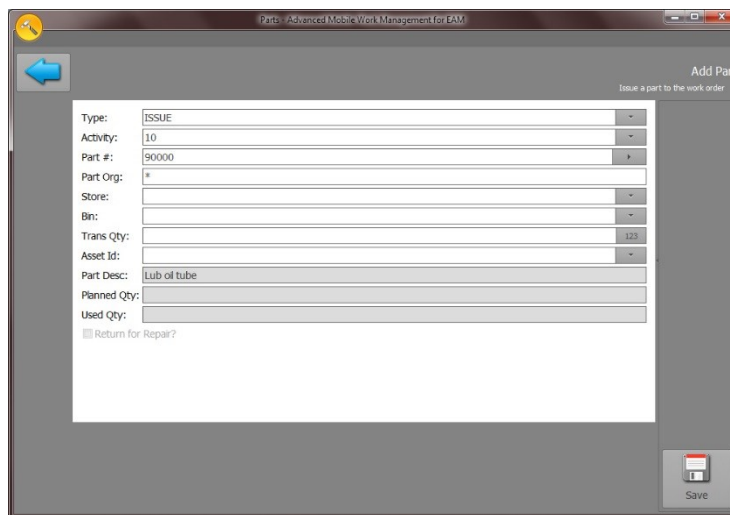
☞ Select on the **Green Checkbox** () to select the desired part



Part Number Selection Step 3

NOTE: Select the **Plus** again to get rid of the sub-part menu and return to the main part list

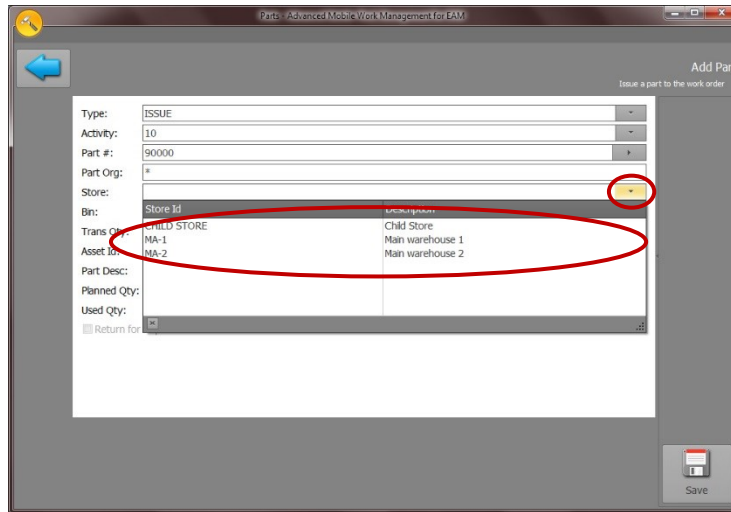
☞ You should be returned to the main **Quick Parts Screen** and see all relevant data populated for you



Part Number Selected

Store

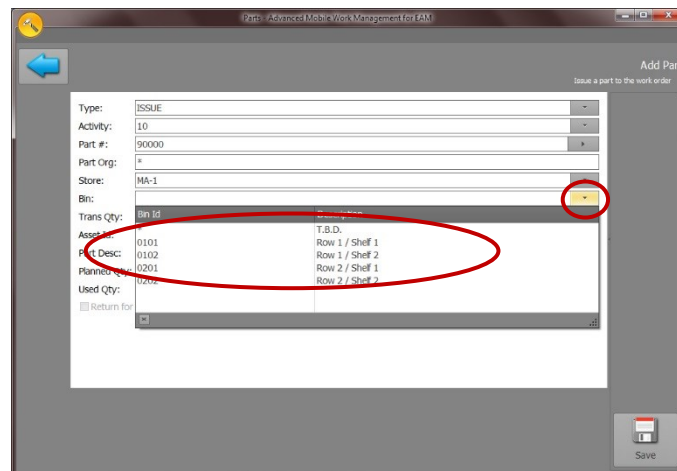
- Select the **Store** dropdown button (▼) to open the **Store Selection** interface, then select the desired location



Quick Parts Store Selection

Bin


- Select the **Bin** dropdown button (▼) to open the **Bin Selection** interface

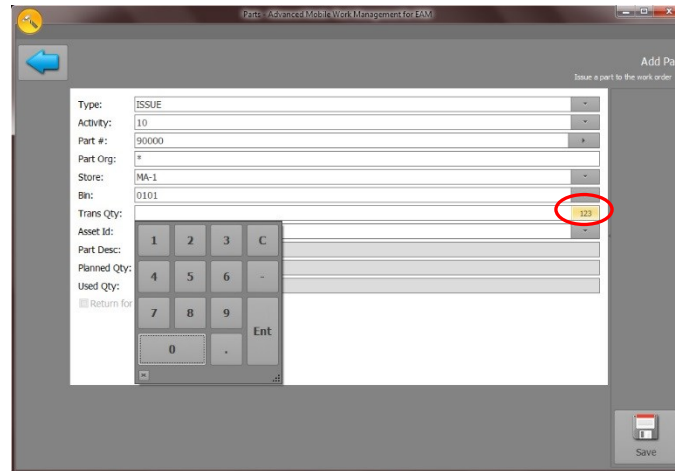


Quick Parts Bin Selection Menu

- Select the * value if you do not know the bin or select a valid **Bin**

Tran Qty

- ☞ Select the **123** button() or enter / scan the **number** indicating how many were used/applied



The screenshot shows the 'Add Part' form with the following fields and values:

Type:	ISSUE
Activity:	10
Part #:	90000
Part Org:	*
Store:	MA-1
Bin:	0101
Trans Qty:	123
Asset Id:	
Part Desc:	
Planned Qty:	
Used Qty:	

A numeric keypad is overlaid on the form, and the '123' button is circled in red.

Tran Qty Specification

Asset ID

- Some environments will require an **Asset ID** and some will not. In most cases where an **Asset ID** is required, it will be automatically populated during the **Part #** selection step. However, in many environments this field can be left blank.

Part Desc

- **Part Desc** is read-only, and if there is default **Part Description** information, it will be automatically populated when you select the part

Planned Qty

- **Planned Qty** is read-only and will be populated based on what is defined in the **EAM Main Server** or when the Work Order was first created

Used Qty

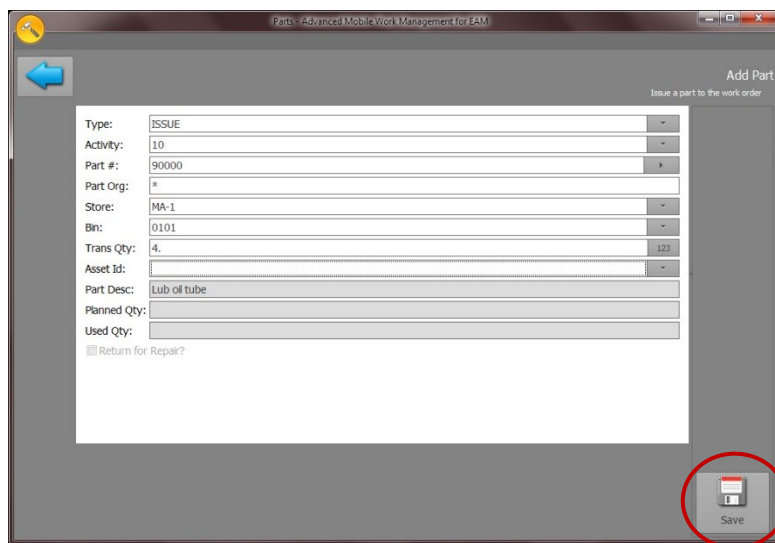
- **Used Qty** is read-only and will be populated by the system

Return for Repair?

- **Return for Repair?** is enabled for some equipment that can be returned to the organization for repair (and replaced on site by the tech)

Save Button

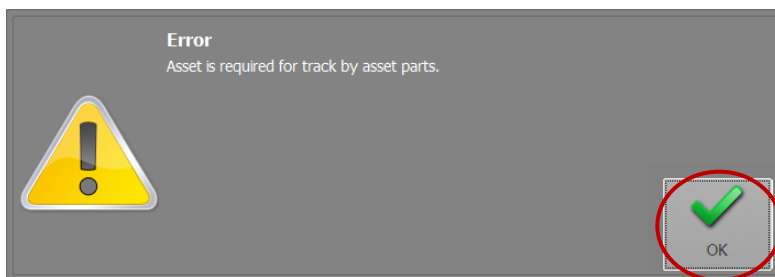
- ☞ Select the **Save** button when you have completed all new part information



Quick Parts Save Button

Asset Required Warning

- ☞ If you selected a part that requires an **Asset ID** and doesn't have one, you will get the **Asset Required Warning**

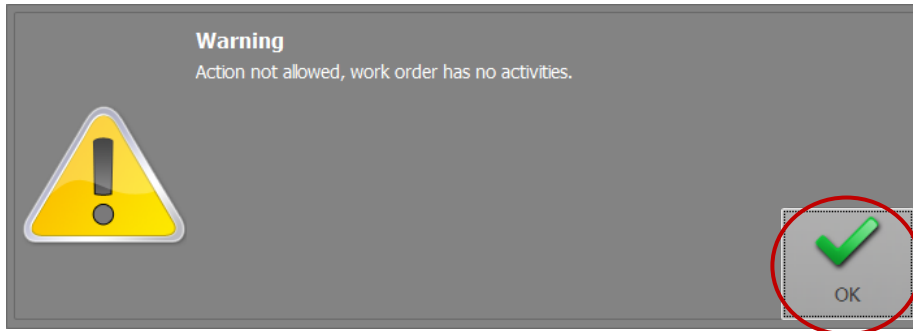


Asset Required Warning Message

- ☞ Select **OK** to move on and contact your System Administrator if you feel that you should be able to associate a part to the Work Order in question

No Activities Warning

- ☞ In the event you get the **No Activities Warning**, either you will be unable to associate labor to the ticket or there is an issue
- ☞ In cases where you want to close out a ticket but no activity is associated to the Work Order, you will be unable to continue and will get the **No Activities Warning**

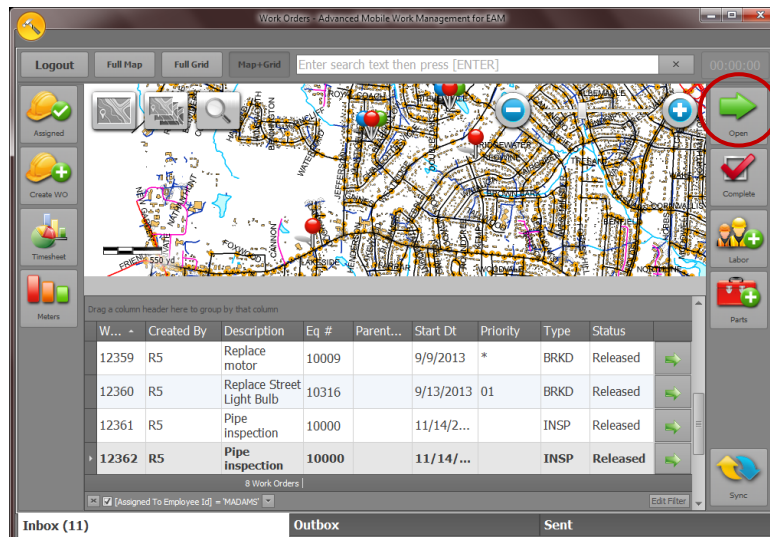


No Activities Warning Message

- ☞ Select **OK** to move on or contact your System Administrator to get an activity associated with the Work Order

Open / Complete Work Orders

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



Opening Work Order Details

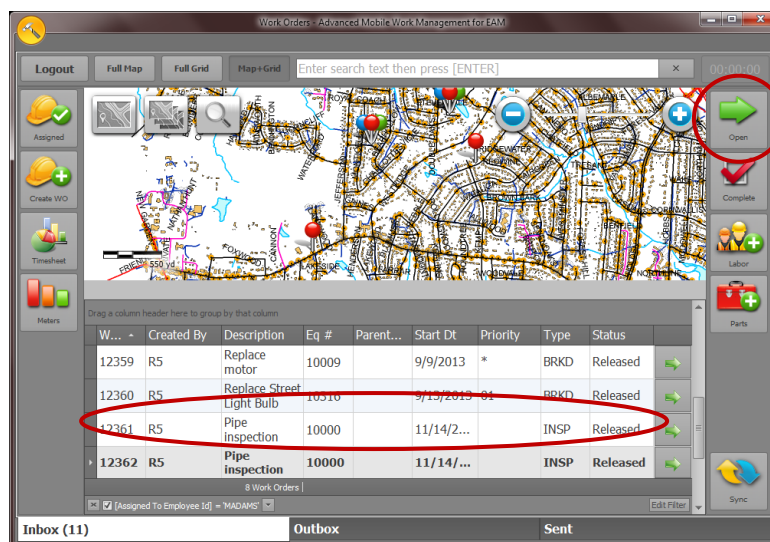
☞ From the **Open** interface, a number of tabbed options are available to view and manage additional, detailed information

NOTE: Please see **Opening the Detailed View** on page 55 for a detailed explanation of this functionality

Detailed Non-Inspection Work Order Processing

Opening the Detailed View

- From the main Work Order screen, select the Work Order you need to manage



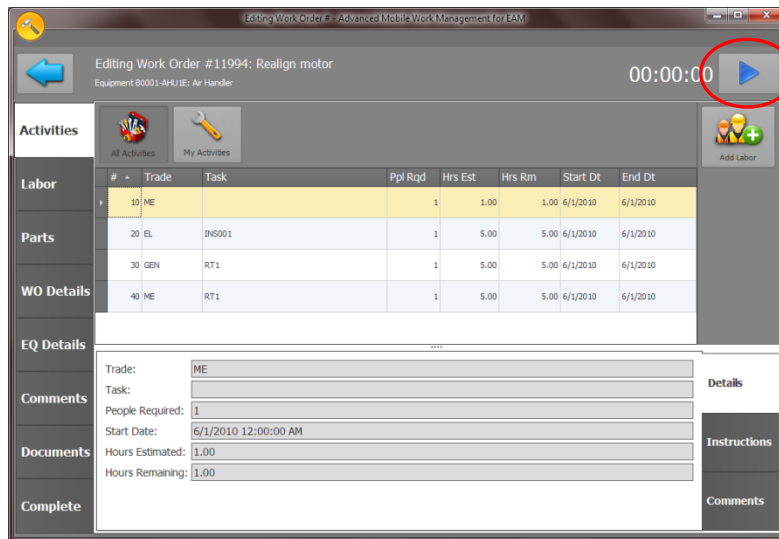
Default Work Order Screen

- Double-tapping the Work Order or selecting the **Open** button will allow access to the **Detailed Work Order** interface which defaults to the Activities view

NOTE: If you get an **Inspection Confirmation Prompt** and want to perform an inspection, please see **Detailed Inspection Processing** on page 96

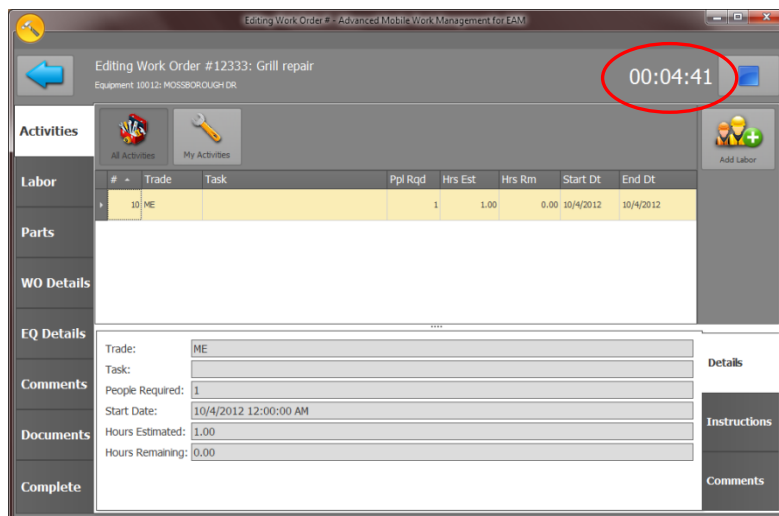
Starting the Labor Timer

☞ To begin the built-in labor timer, click the labor timer **Start** button



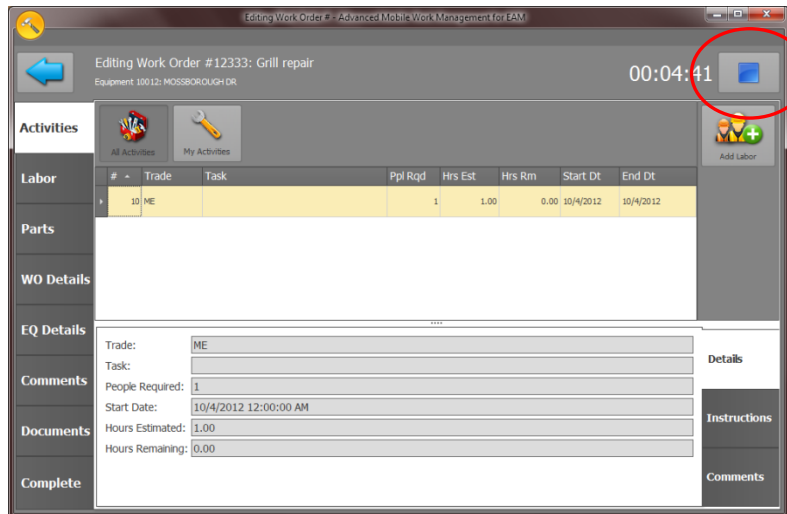
Labor Timer Start Button

☞ The **Labor Timer** tracks the time expired on the clock and displays it next to the labor timer **Start/Stop** button



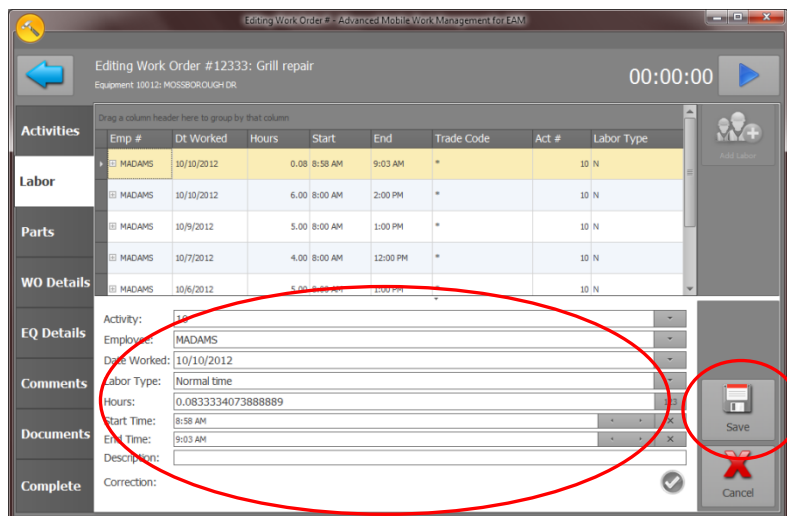
Labor Time Tracking

Click the labor timer **Stop** button again to log the time



Labor Timer Stop Button

The application will change to the **Labor Entry** screen and auto-populate the Labor Entry fields



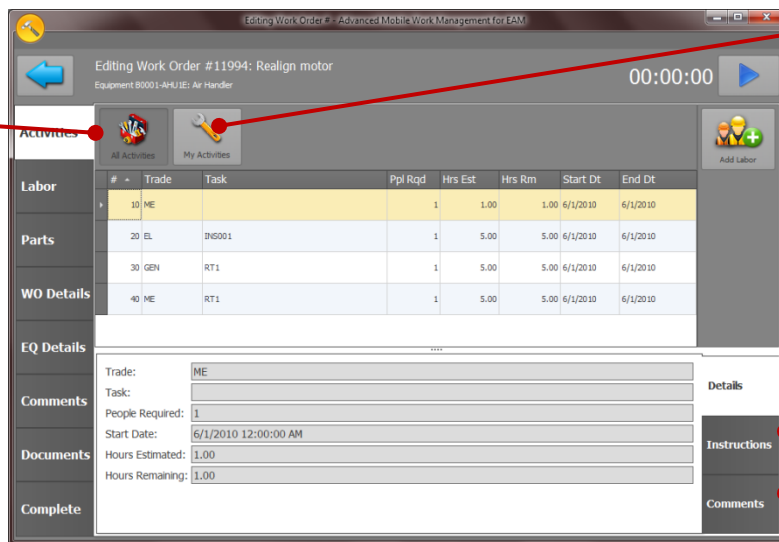
Labor Timer Auto-Entry

Click **Save** to apply this time to the associated Work Order

Activities

The **Activities Summary** tab displays all activities associated to the current Work Order and enables the user to:

- Filter **Activity** entries
- View the **Activity Details, Instructions & Comments**
- Enter **Labor** against an **Activity**



'All Activities' Filter Displays all Work Orders regardless of who did the work

'My Activities' Filter Displays only those Work Orders scheduled to the

Additional Detail Access to additional Details, Instructions and Comments about the Work Order

View Activities Screen

All Activities Filter

Selecting the **All Activities** filter will display all activities that are or have been assigned to this ticket

NOTE: The list can include activities performed by other workers

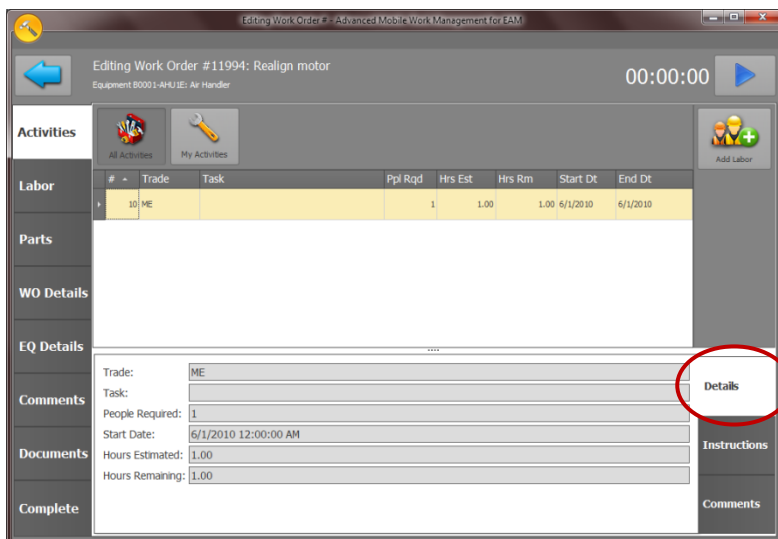
My Activities Filter

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

Details

Select the **Details** tab to view more *read-only* information on the activity including:

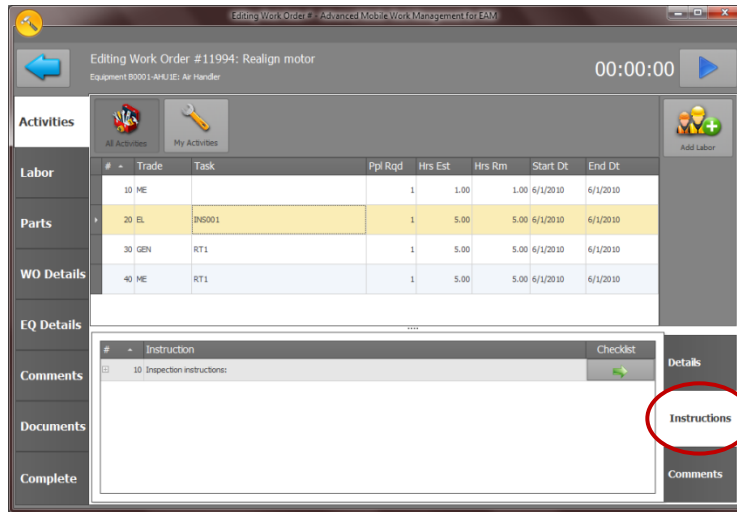
- **Trade** – The role or skill-set necessary to successfully complete the work
- **Task** – The job that needs to be completed
- **People Required** – The total number of people required to complete the work
- **Start date** – Required start date for the work to begin and used to estimate when completion can be expected
- **Hours Estimated** – Total number of hours estimated to complete the task
- **Hours Remaining** – Total hours estimated till completion based on total number of hours already worked



Activity Details Screen

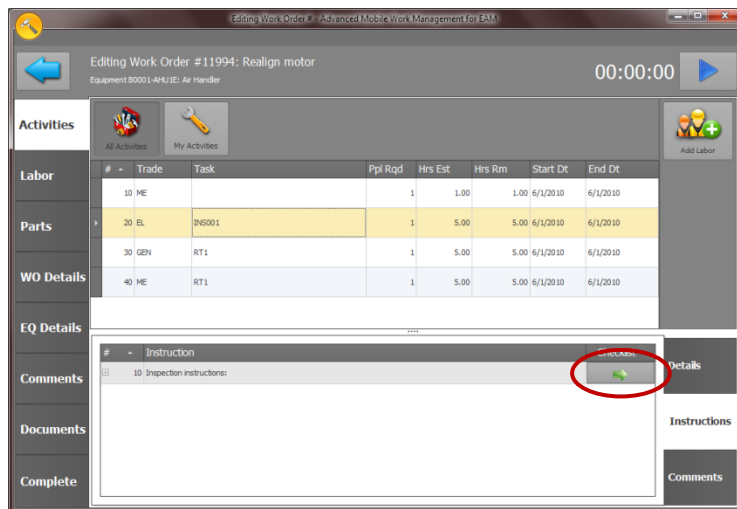
Instructions & Checklists

- Select on the **Instructions** tab to view the *read-only* instructions defined when the Work Order was originally created



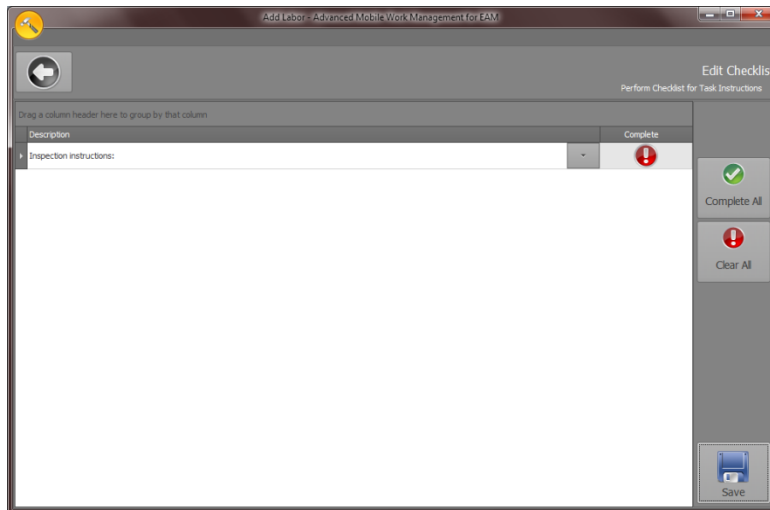
Activities Instructions

- To access the pre-defined checklist of tasks associated with the activity, select the **Checklist** button (if present)



Checklist Access

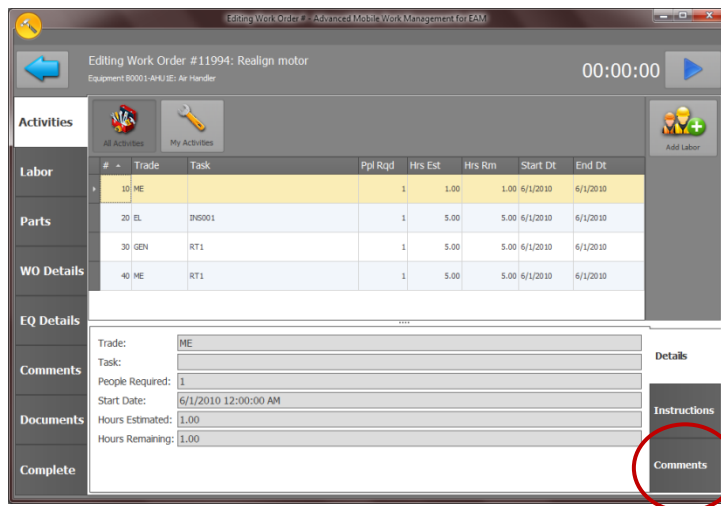
☞ The **Checklist** options will be displayed



Checklist Options

Comments

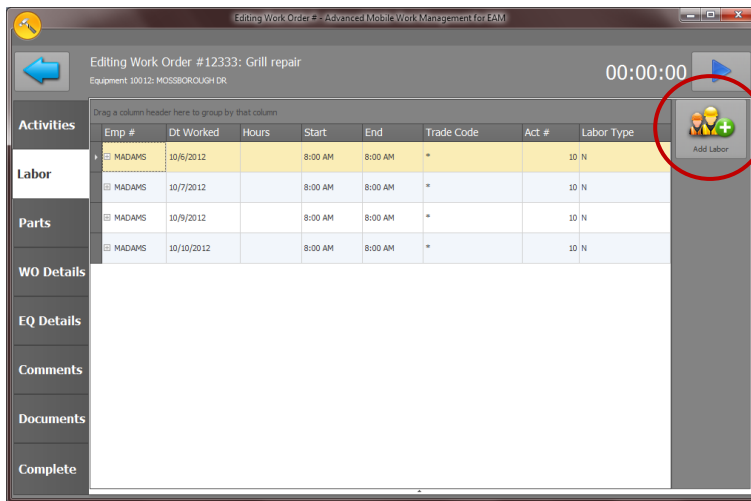
☞ Select the **Comments** tab to review any custom comments



Activities Details, Comments & Instructions

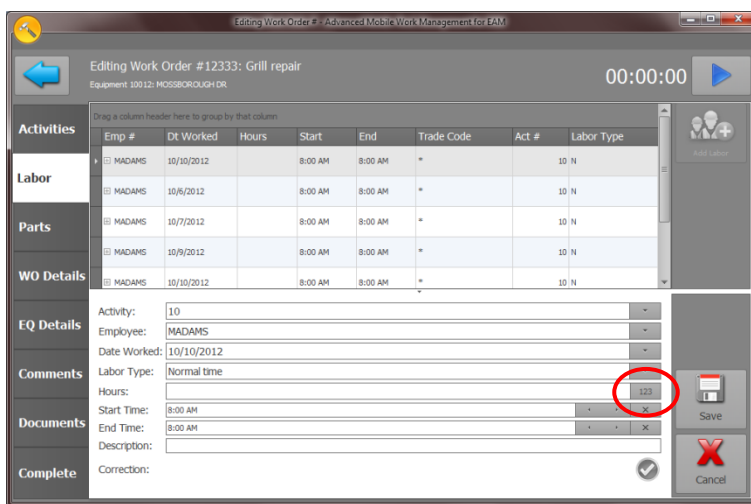
Labor

☞ The **Labor** tab displays all **READ ONLY** entries associated to the Work Order




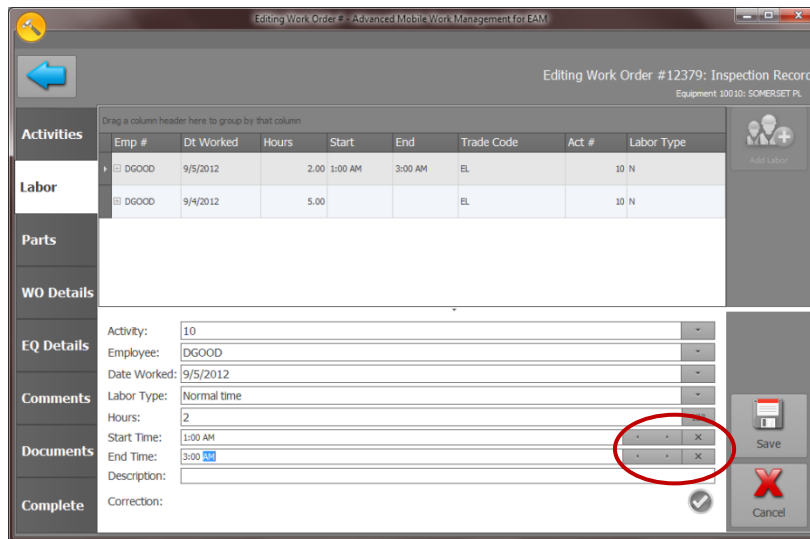
Labor Summary Screen & Add Labor

- ☞ Select on the **Add Labor** button to add new **Labor** entries
- ☞ **Activity, Employee** and **Date Worked** should already be populated but can be altered as needed
- ☞ Click the **123 Button** () to expose the keypad




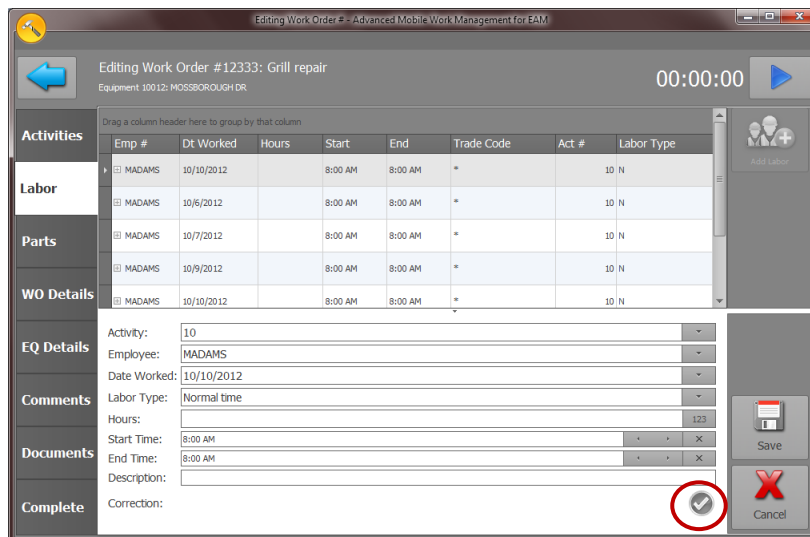
Add Labor Details Screen

- ☞ Set the **Start Time** and **End Time** by clicking the Left and Right arrows () for those fields.



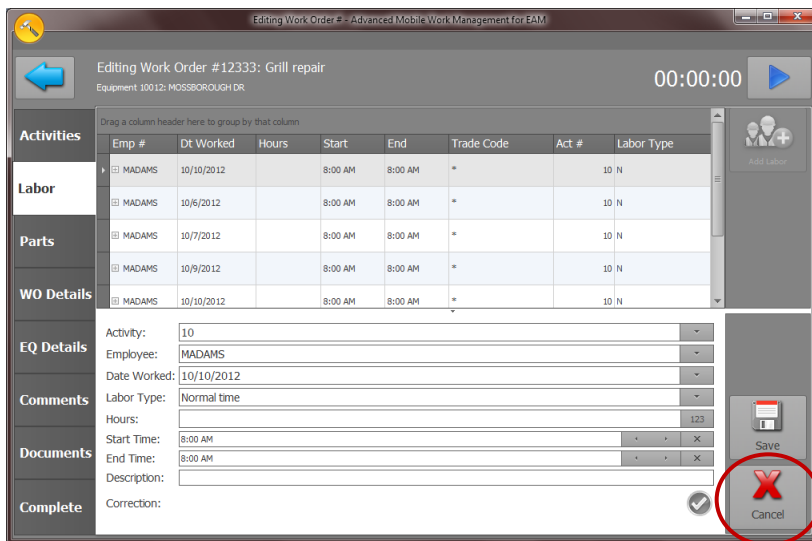
Setting the Start and End Time

- ☞ Be **CERTAIN** to set the **AM** and **PM** values appropriately
- ☞ If this is a *reduction* in labor, click the **Correction button** () or use the device keypad to input a negative number



Labor Correction

☞ To log the additional hours, select **Save**



Saving Labor Entries

No Activities Warning

☞ In cases where you want to close out a ticket but no activity is associated to the Work Order, you will be unable to continue and will get the **No Activities Warning**

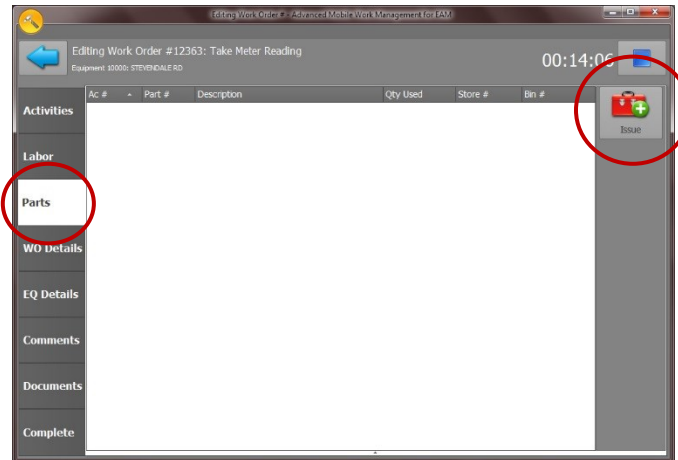


No Activities Warning Message

☞ Select **OK** to move on or contact your System Administrator to get an activity associated with the Work Order

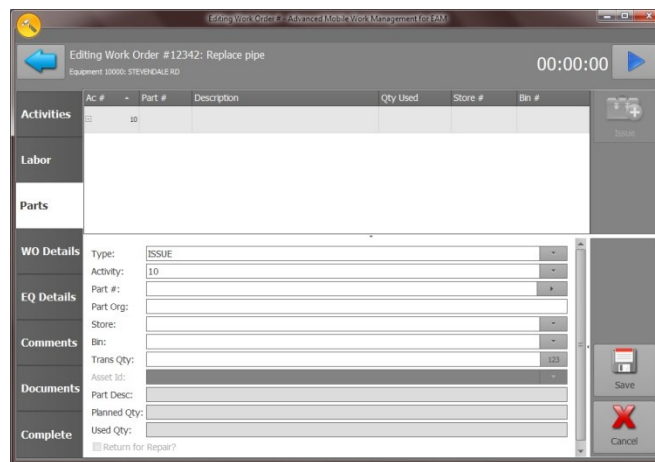
Parts

- Select the **Parts** tab to display any **Planned Materials** associated to the Work Order and any **Parts** or **Materials** issued against the Work Order




Parts Detail Tab

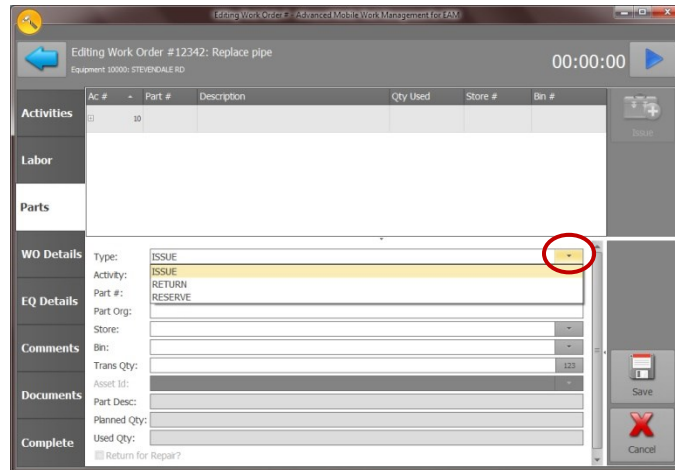
- Select the **Issue** button
- The **Select Parts UI** will appear



Select Parts UI


Specify Type

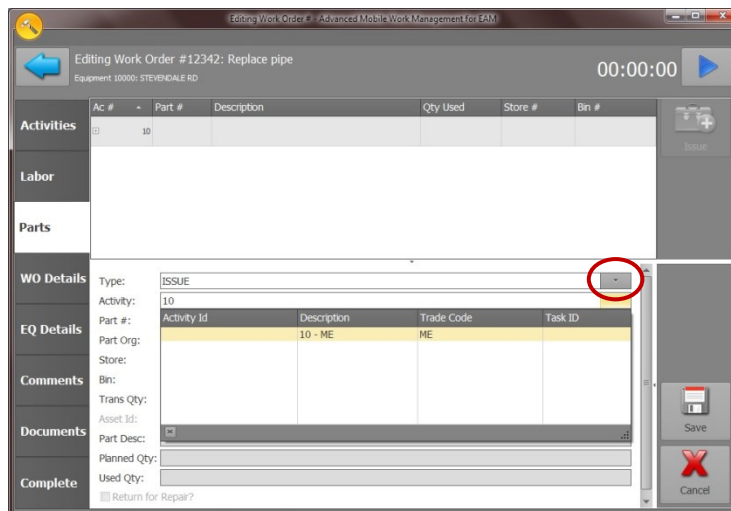
- Select the **Parts Type** dropdown button() to open the **Parts Type List** and select the parts type



Parts Assign Type


Specify Activity

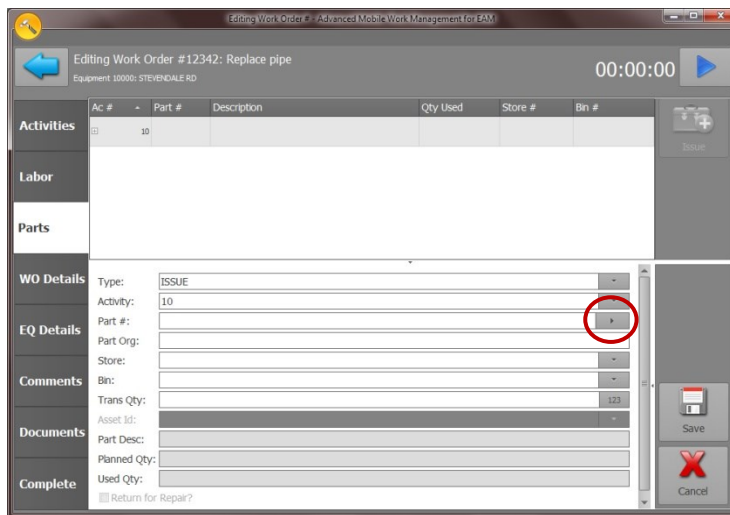
- Select the **Parts Activity** dropdown button() to open the **Parts Activity List** and select the appropriate activity



Parts Assign Activity

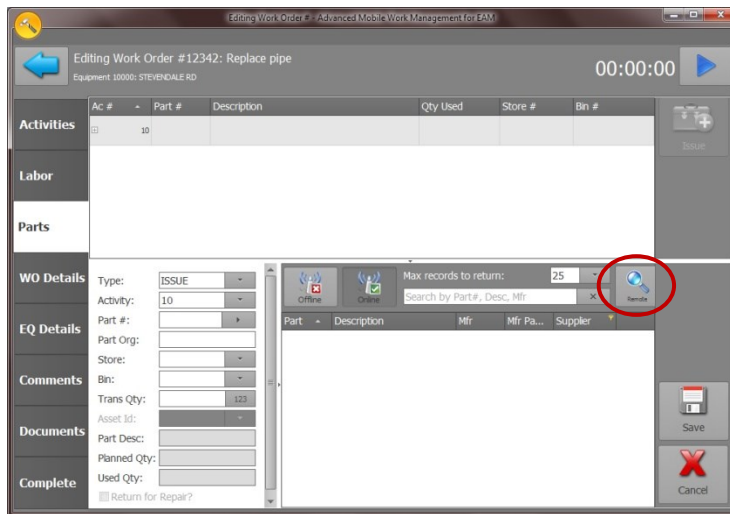
Specify Part

- Select the **Part #** dropdown button() to open the **Parts List**



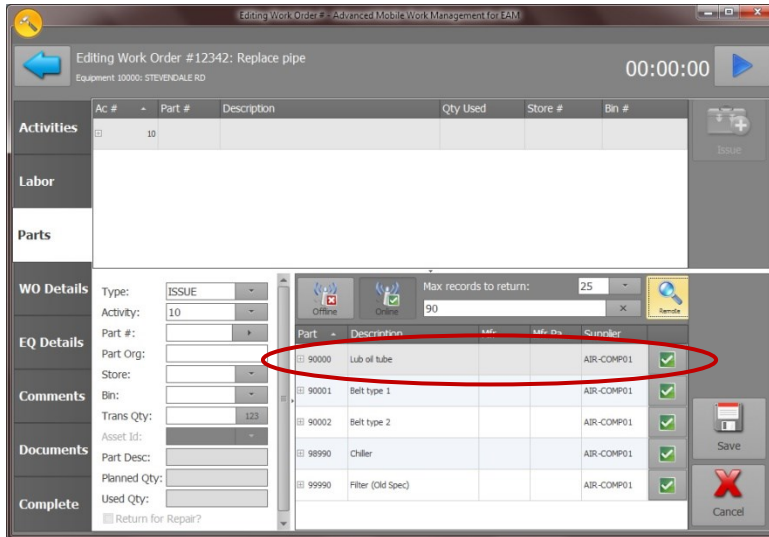
Specify Part Step 1

- ☞ Specify the **Part Number** you need and/or click the **Remote** button



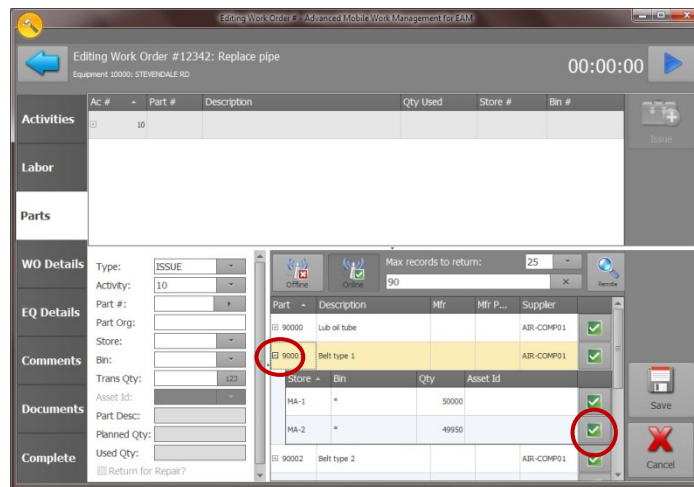
Specify Part Step 2

☞ Select the **Part** you need



Specify Part Step 3

☞ If applicable, select the **Plus (+)** to expand part selection options if they are available

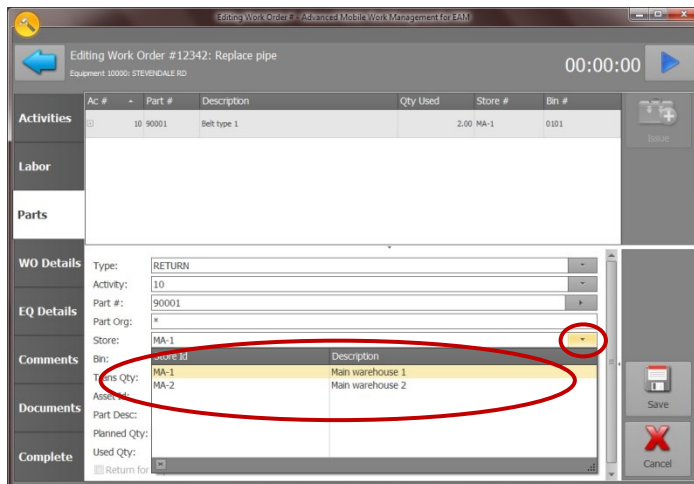


Specify Part Step 4

☞ Select the **Green Checkbox** to select the desired part, and the screen should revert to the **Parts** main screen with that part number populated

Store

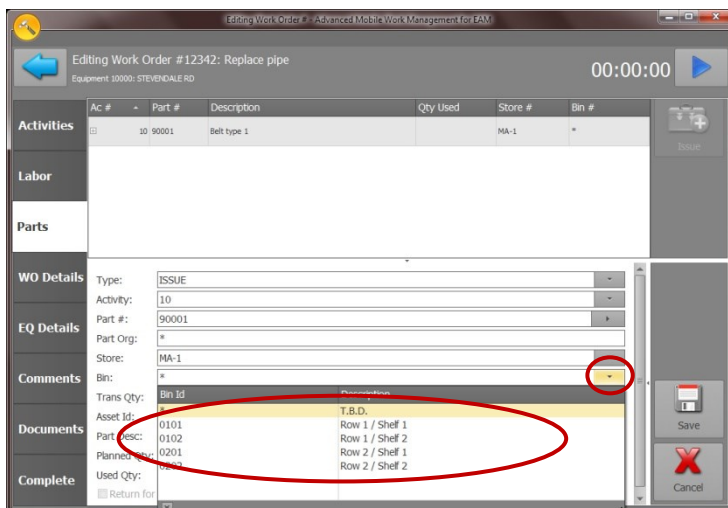
- Select the **Store** dropdown button() to open the **Store Selection Interface**, then select the desired location



Quick Parts Store Selection

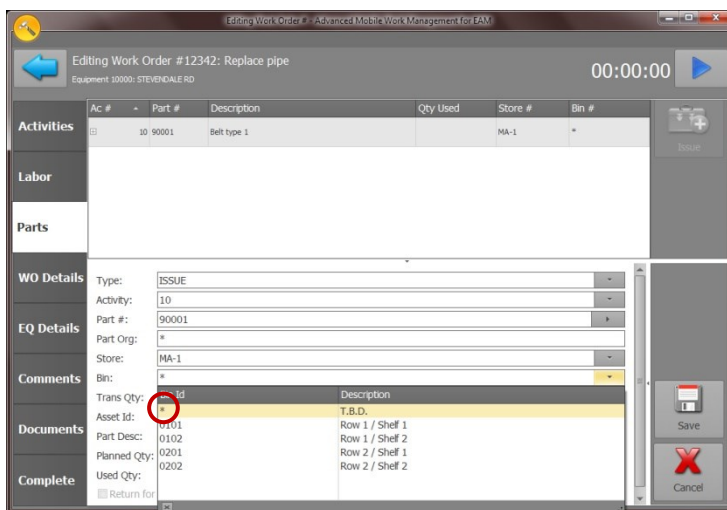
Bin

- Select the **Bin** dropdown button() to open the **Bin Selection Interface**




Quick Parts Bin Selection Menu

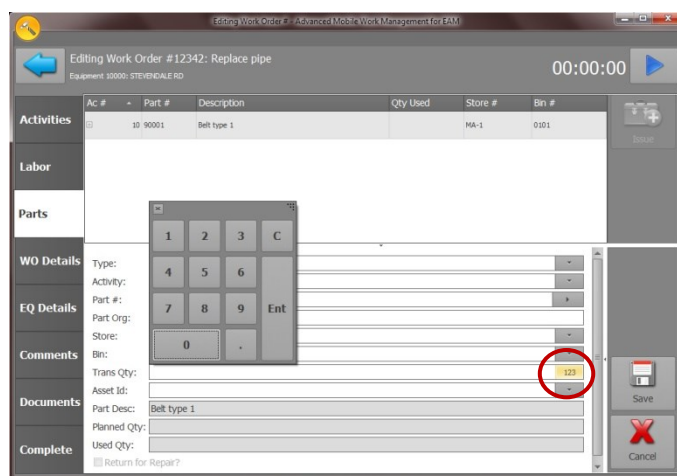
☞ Select the * value if you do not know the bin or select a valid **Bin**



Quick Parts Bin Selection

Tran Qty

☞ Enter / scan the **number** indicating how many were used / applied or select the **123** button() and enter the numerals that way



Tran Qty Specification

Asset ID

- Some environments will require an **Asset ID** and some will not. In most cases where an **Asset ID** is required, it will be automatically populated during the **Part #** selection step. However, in many environments this field can be left blank.

Part Desc

- **Part Desc** is read-only, and if there is default **Part Description** information, it will be automatically populated when you select the part

Planned Qty

- **Planned Qty** is read-only and will be populated based on what is defined in the **EAM Main Server** or when the Work Order was first created

Used Qty

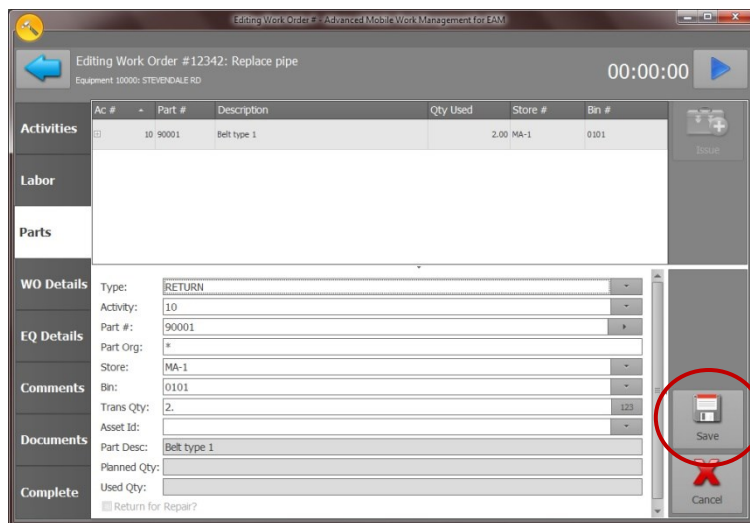
- **Used Qty** is read-only and will be populated by the system

Return for Repair?

- **Return for Repair?** is enabled for some equipment that can be returned to the organization for repair (and replaced on site by the tech)

Save Button

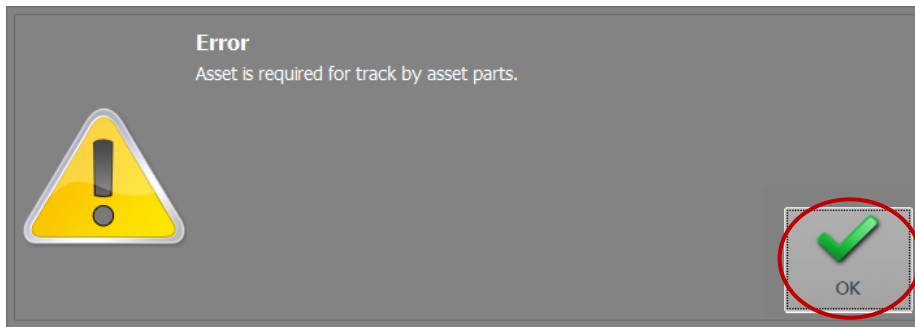
Select the **Save** button when you have completed all new **Part** information



Quick Parts Save Button

Asset Required Warning

- In cases where you selected a part that requires an **Asset ID** but one is not associated, you will be unable to associate that part to the Work Order and will get the **Asset Required Warning**

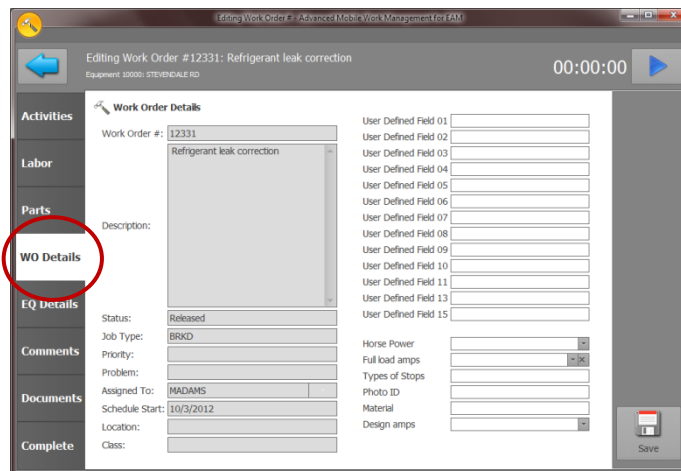


Asset Required Warning Message

- Select **OK** to move on, and contact your System Administrator if you feel that you should be able to associate a part to the Work Order in question

WO Details

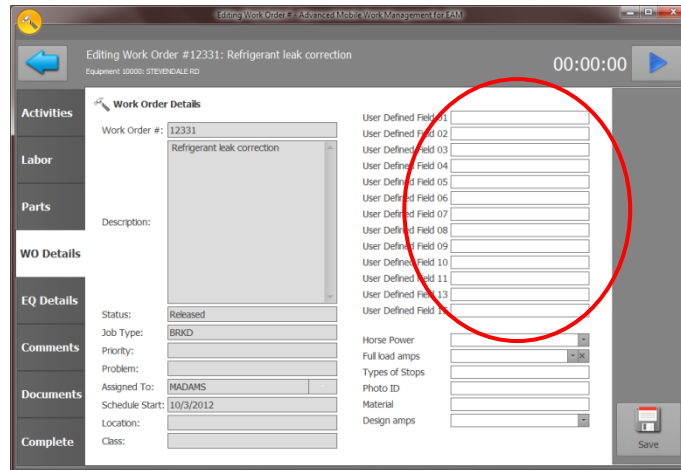
- To view read-only data on the active Work Order and access other functions, select the **Details Tab**



Details Tab

User Defined Fields

- ☞ The system allows for Administrators to create **User Defined Fields** for use with your enterprise

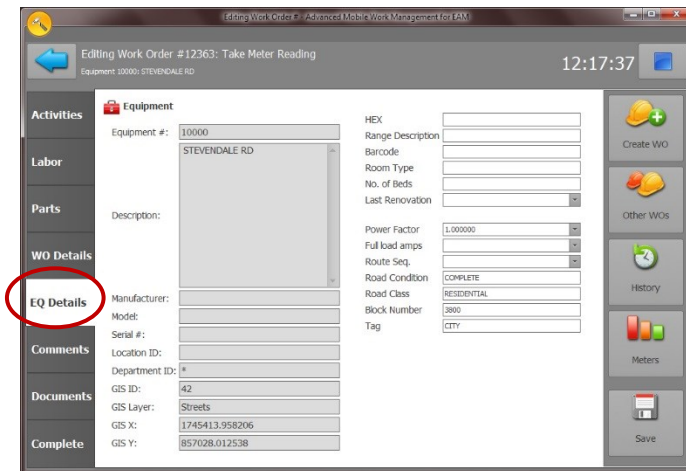


WO Details User Defined Fields

- ☞ These must be created and configured in both the EAM server and the Advanced Mobile Portal. Please see your system administrator for more information

EQ Details (Equipment Details)

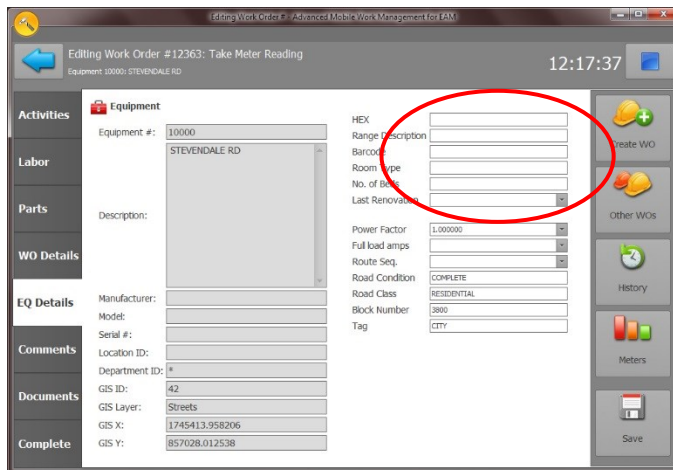
- ☞ To view read-only data on the active Work Order and access other functions, select the **Details Tab**



User Defined Fields

User Defined Fields

- ☞ The system allows for Administrators to create **User Defined Fields** for use with your enterprise

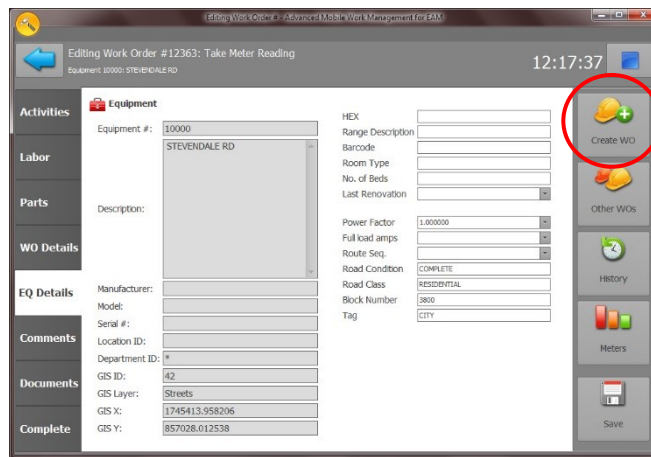


EQ Details User Defined Fields

- ☞ These must be created and configured in both the EAM server and the Advanced Mobile Portal. Please see your system administrator for more information

Create New Work Orders (New WO)

- ☞ Select the **Create WO** button

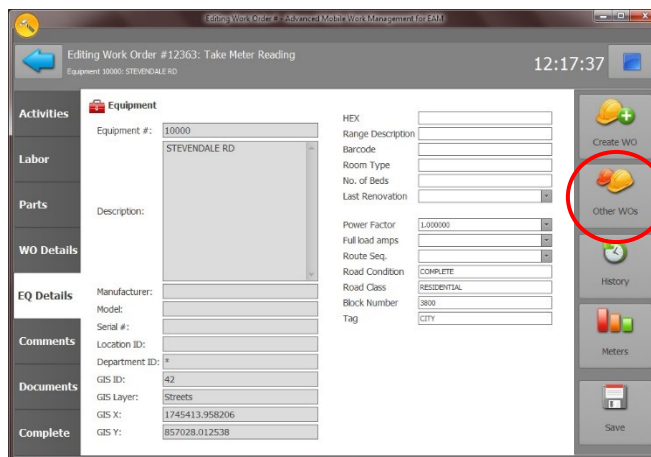


Creating New Work Orders

- ☞ Please see **Creating Work Orders** on page 105 for detailed information

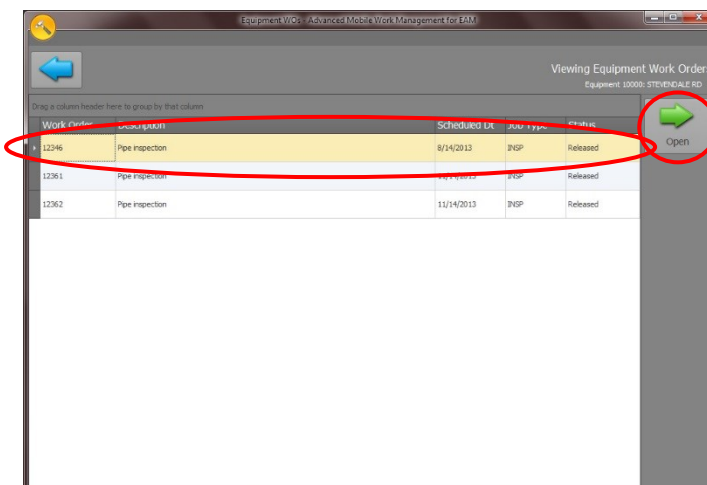
Access Related Work Orders (Other WOs)

- ☞ Select the **Other WOs Button**



Reviewing Related Work Orders

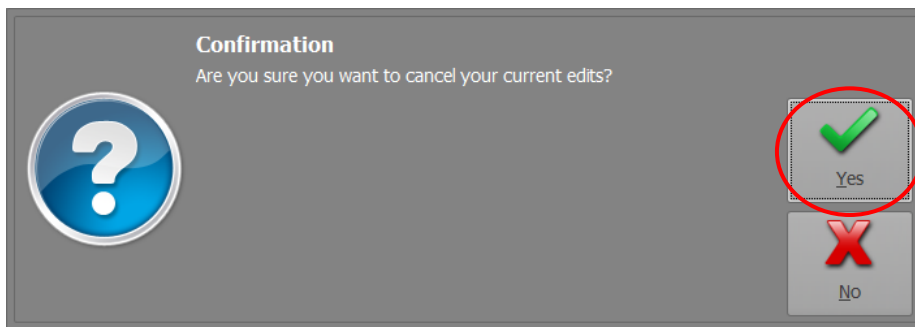
☞ Select the desired Work Order



Other Work Orders Screen


☞ Select the **Open Button**

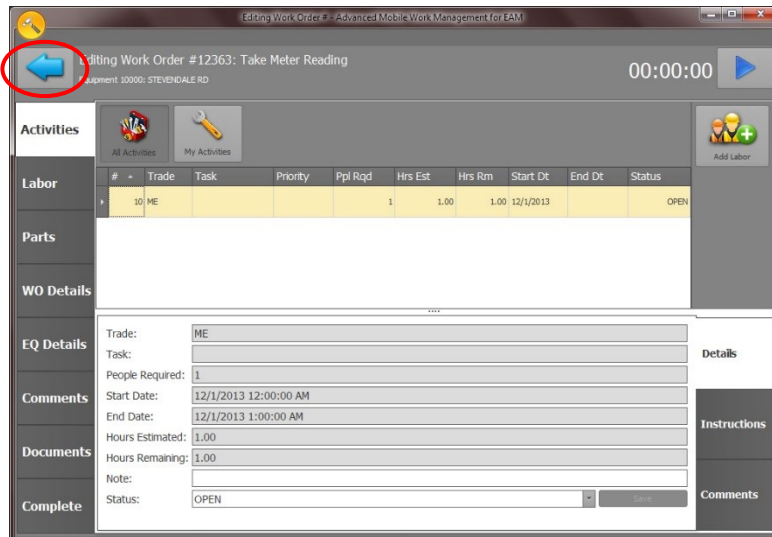
☞ When prompted about leaving the current Work Order, select **Yes**



Confirmation to Leave Current Work Order

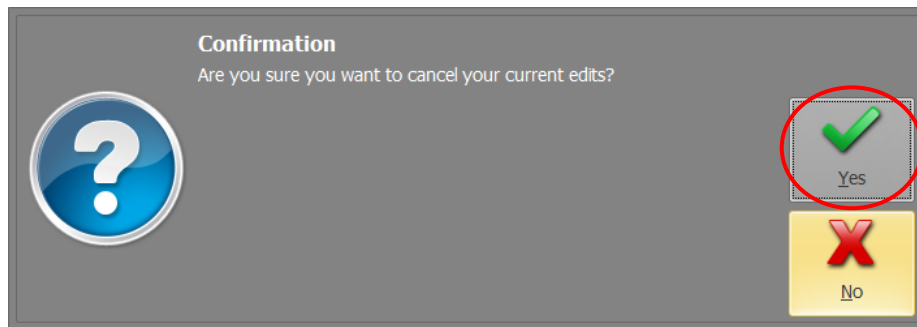
☞ Work with the related Work Order as you would any normal Work Order

☞ Select the **Back Button** () to return to the original Work Order when you have finished with the related Work Order



Related Work Order

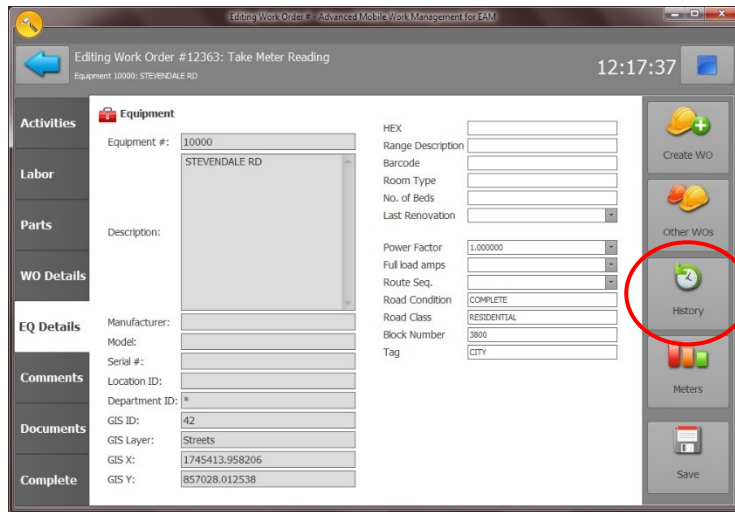
☞ When prompted about returning to the original Work Order, select **Yes**



Confirmation to Leave Current Work Order

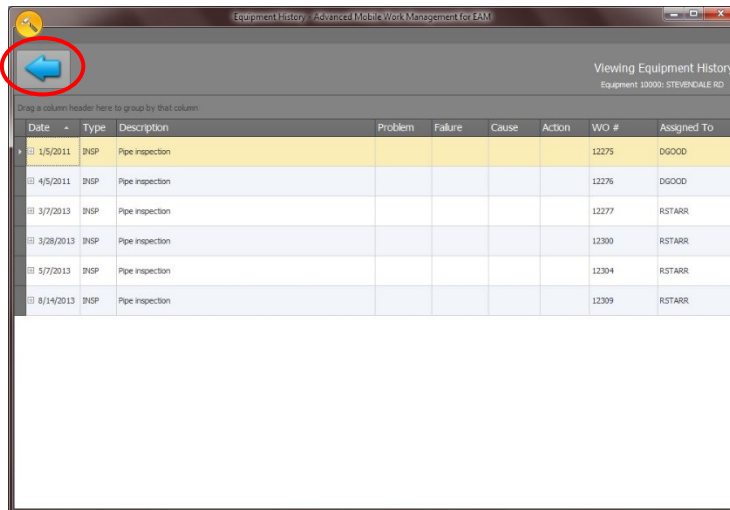
Work Order History

☞ Select the **History Button**




Selecting Work Order History

☞ Review the *read-only* history of all actions taken on the Work Order

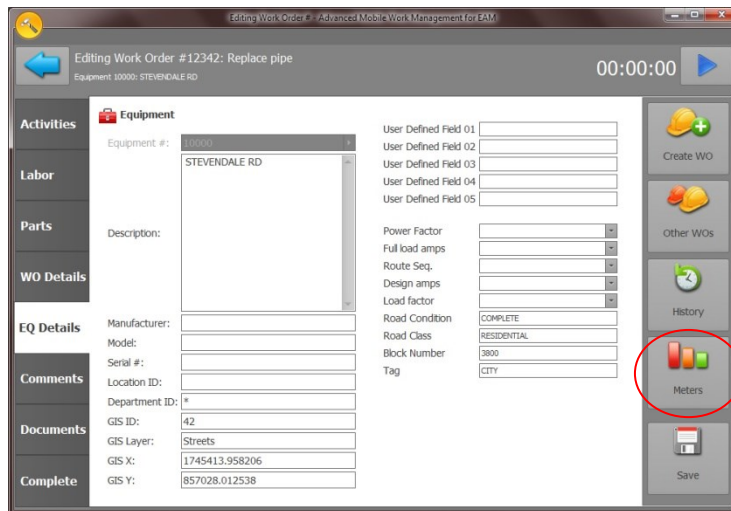


Work Order History

☞ Select the **Back Button** () to return to the original Work Order when you have finished with the related Work Order

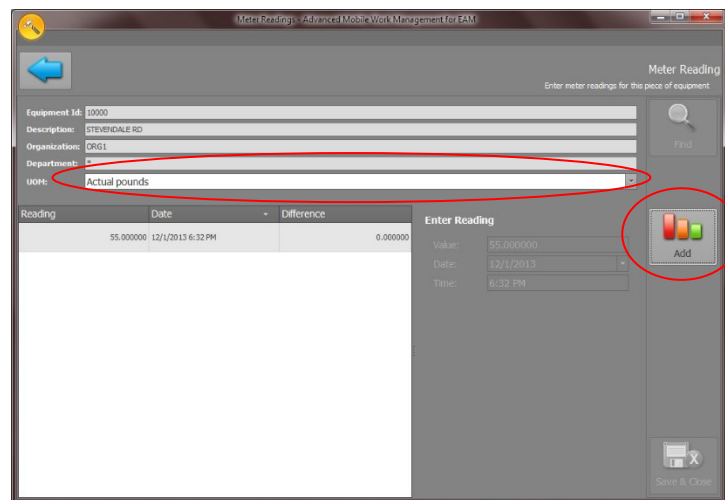
Meters

☞ Select the **Meters** button



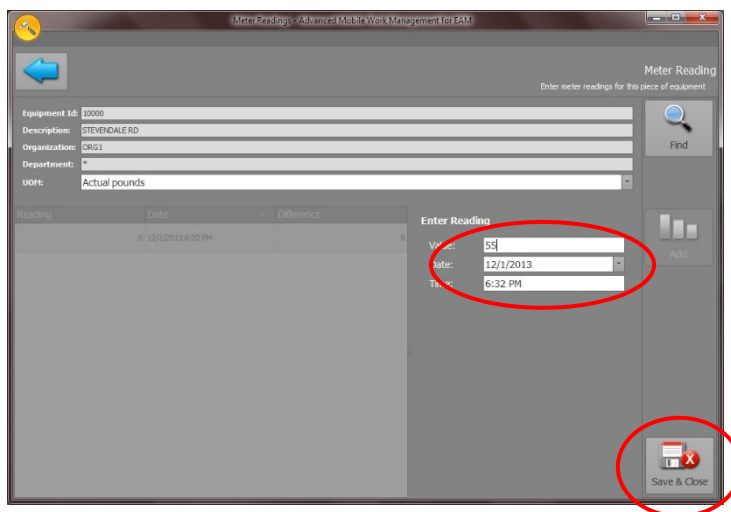
Accessing Meter Readings

☞ Specify the **UOM** (Unit of Measure) and select the **Add** button



Add Meter Reading

➤ Enter the meter reading in the **Value** field



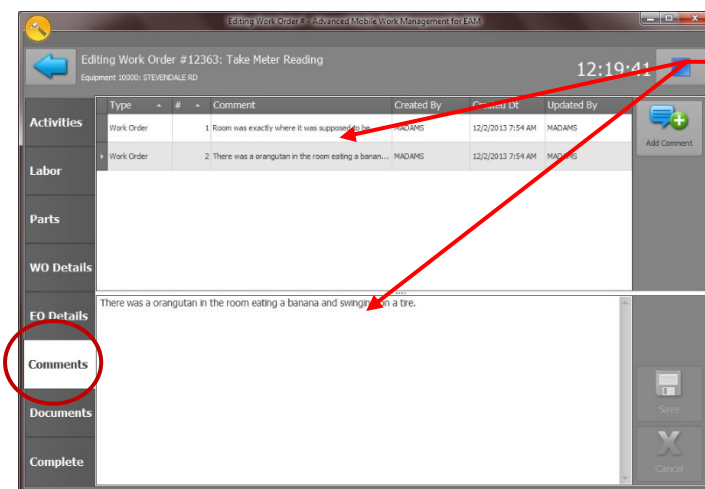
Saving Meter Reading

➤ To finalize your entry, select the **Save & Close** button

➤ You will be returned to the **Details Screen** when the data is saved

Comments

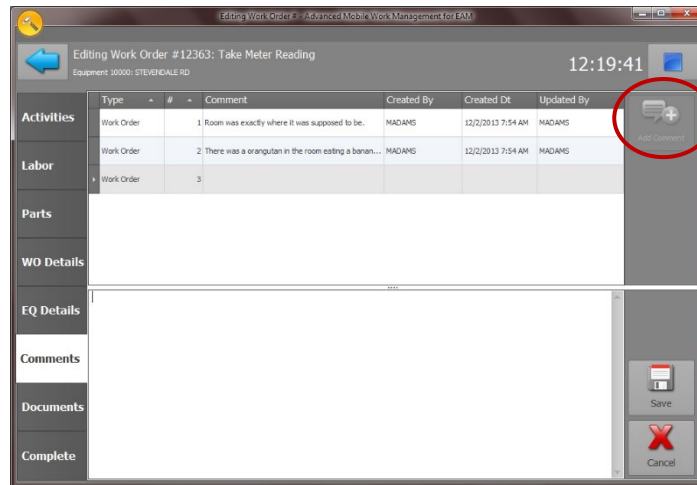
The **Comments** tab displays all comments associated to the current Work Order



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

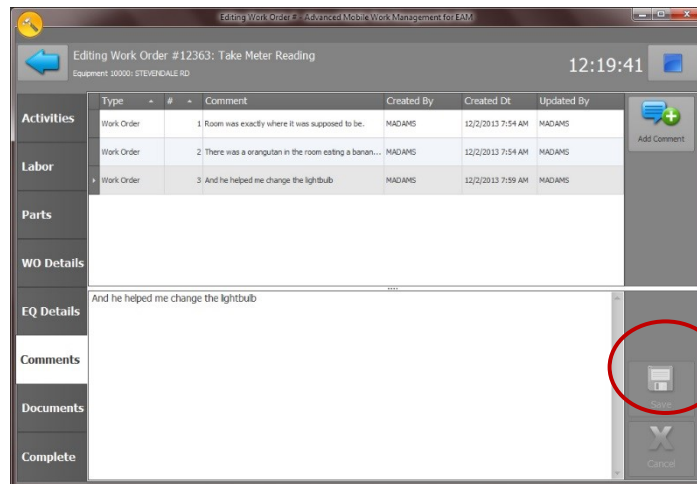
Comments Screen

☞ Select the **Add Comment** button to create a new comment



Add Comments

☞ Enter your comments in the **Comment** text box



Saving Comments

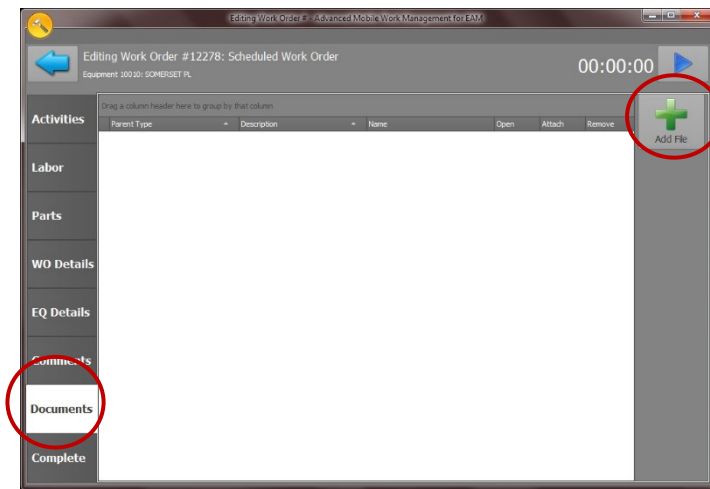
☞ Select the **Save** button to save your entry

NOTE: Once created, a comment cannot be edited, and all **Comments** are tagged with the current Employee ID, date and time to make sorting and searching easier

Documents

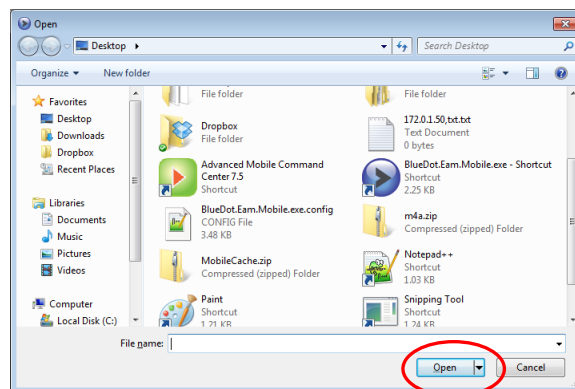
The **Document** tab allows you to attach documents or review documents already attached.

☞ Click the **Add File** button to add a new document to the **Work Order**



Adding New Documents

☞ Using the **Windows UI**, navigate to the file you need to attach



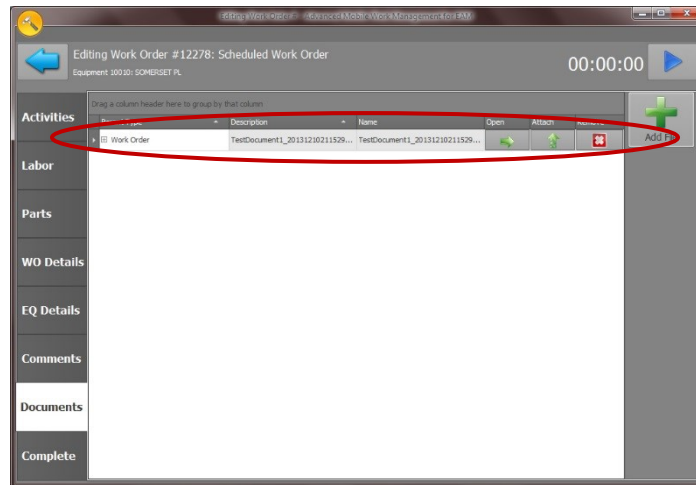
Windows Document Add UI

☞ Select the **File** and select **Open**

NOTE: Devices may require additional plug-ins / add-ons in order to read specific file types. See your Administrator if your device cannot read an attached file.

NOTE: The EAM Server is configurable to only use specific file types

☞ The file should show as a new record in the Documents UI

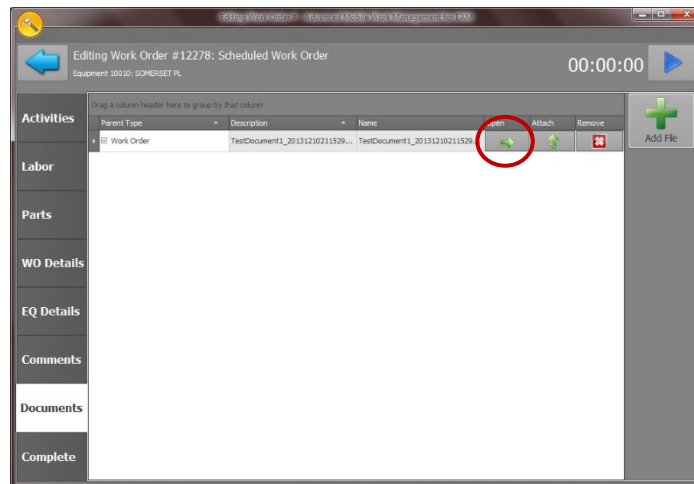


Uploading the Document

☞ Proceed to Attaching Documents below to transmit the file to the EAM server

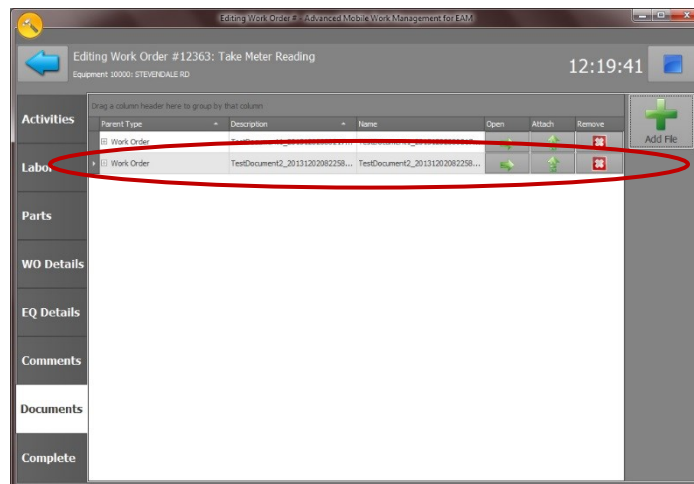
Attaching Documents

- Once a file is first added to the Documents UI, you must click **Open** to reformat the attachment for use in the EAM environment



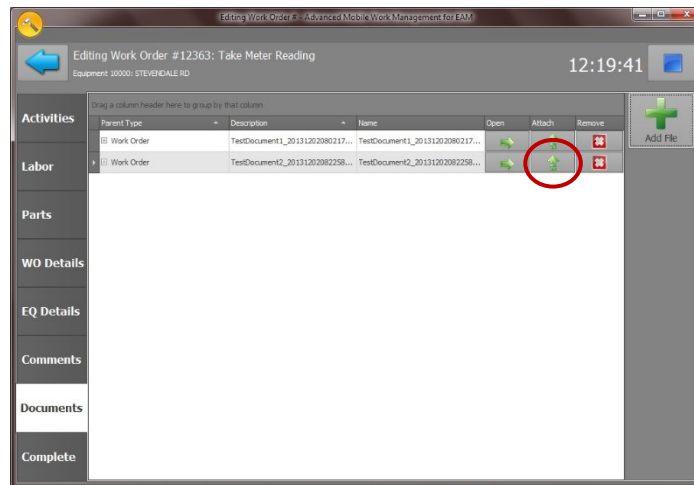
Uploading the Document

- A second record will appear for the attachment



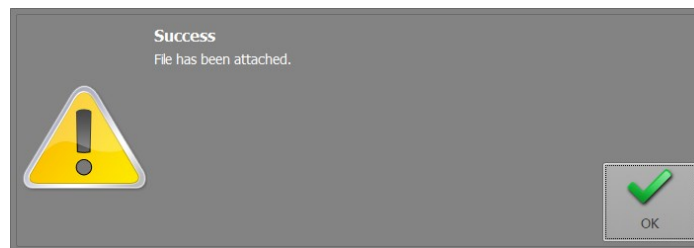
Uploading the Document

- ☞ The device will physically open the file as well
- ☞ Close the opened file
- ☞ Click the **Attach** button for the second record to upload the file to the Work Order record for submission to the EAM server



Uploading the Document

- ☞ You should see the following success message

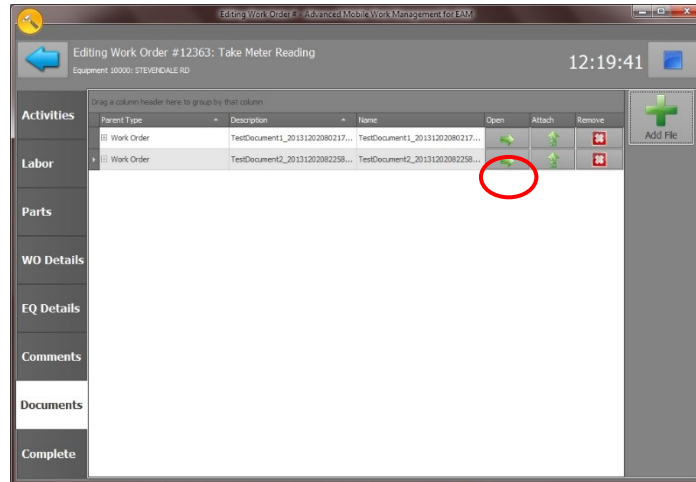


Successful Document Attachment

- ☞ Click **OK** to proceed

Opening Attached Documents

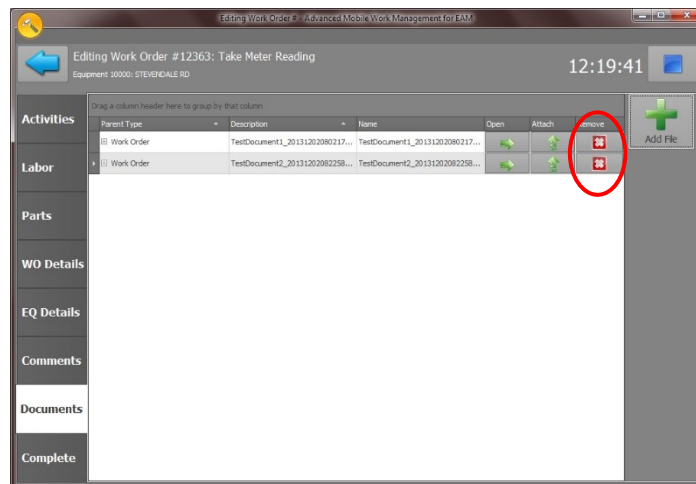
- ☞ Click the **Open** button to view an attached document



Opening a Document

Removing Attached Documents

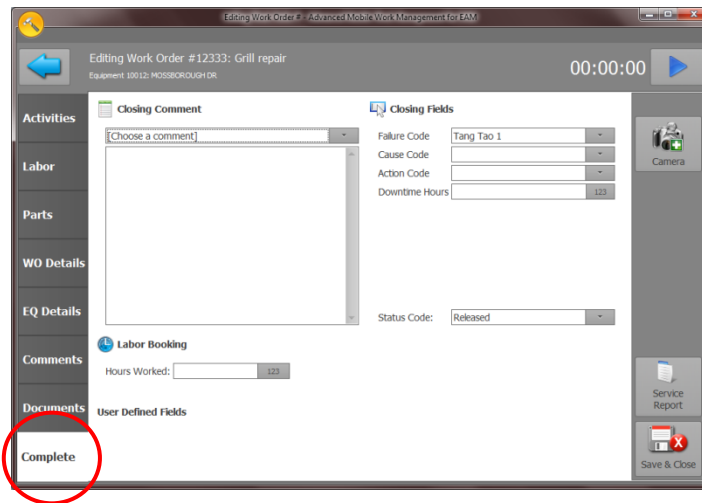
Click the **Remove** button to delete an attached document



Removing a Document

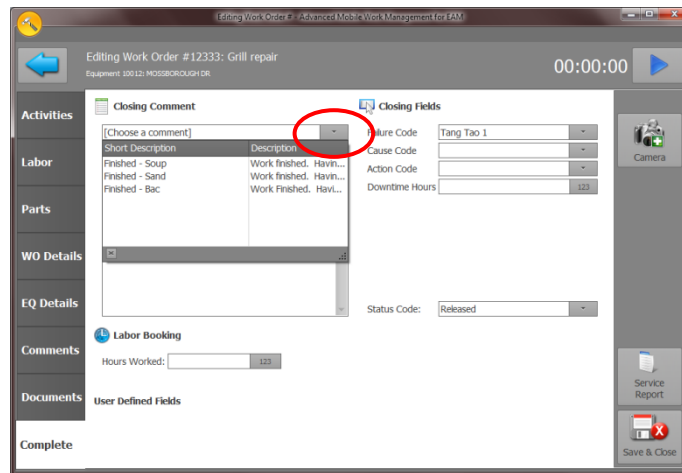
Completing Work Orders

The **Complete** tab allows you to close out the selected Work Order



Closing Main Screen

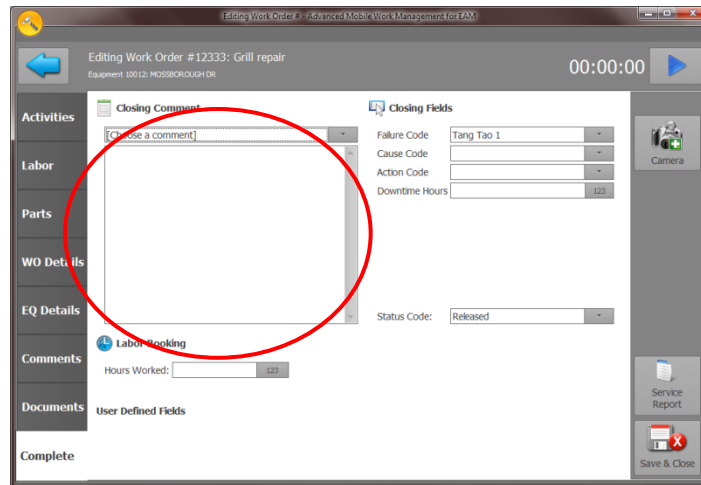
☞ Select the **Standard Comment** button (▾) to select a **Closing Comment**



Comment Entry Screen

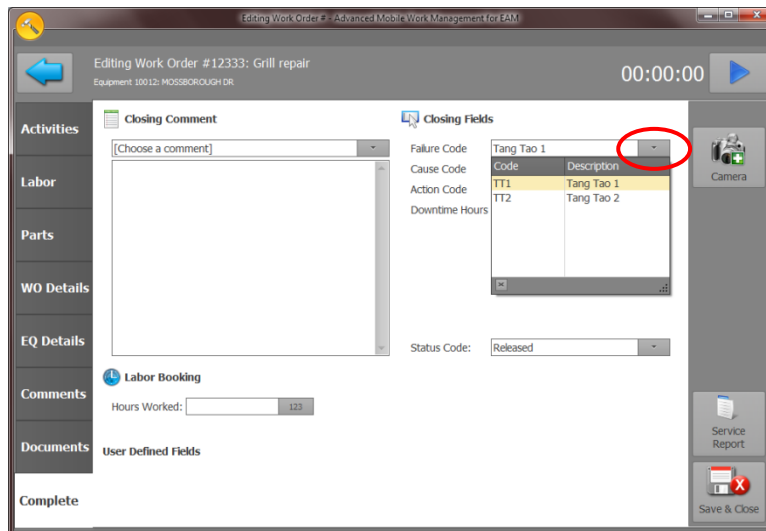
NOTE: The Comments dropdown option may not be available for all instances. They are defined in the Advanced Mobile Admin Portal. Please see your system administrator

☞ Or use the **Custom Comment** text box to enter additional comments



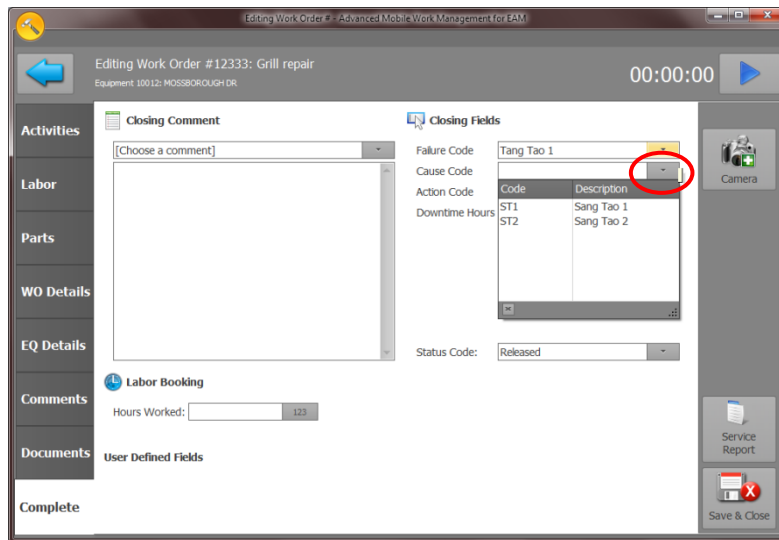
Comment Text Box

☞ Select the **Failure Code** drop down () and select a **Failure Code**



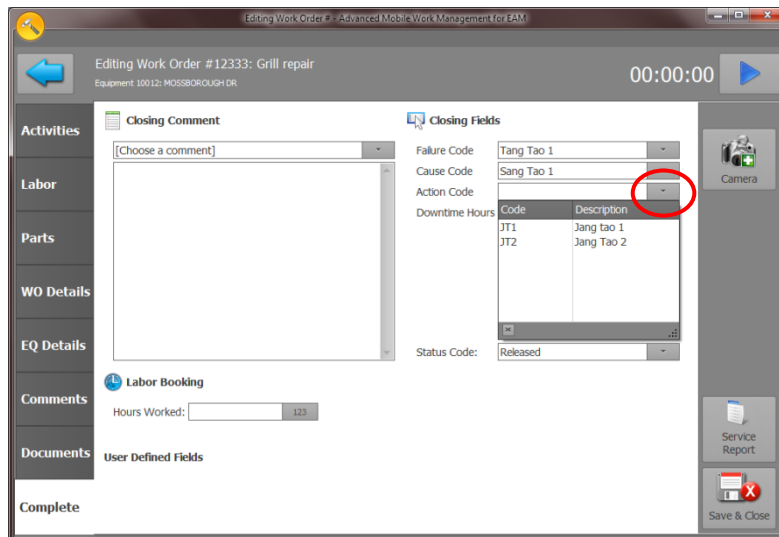
Select Failure Code

☞ Select the **Cause Code** drop down (▾) and select a **Cause Code**



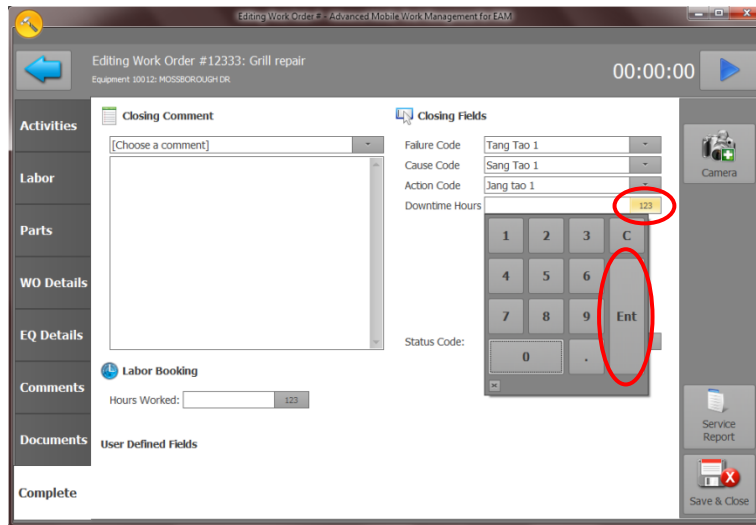
Select Cause Code

☞ Select the **Action Code** drop down (▾) and select an **Action Code**



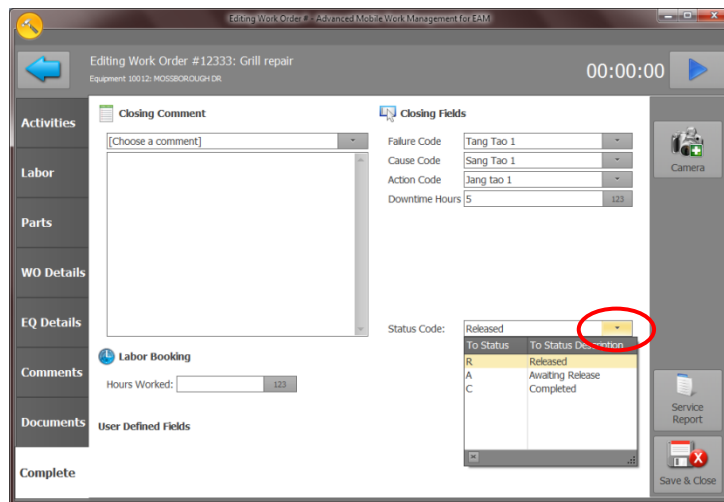
Select Action Code

- ☞ Select the **Hours Down 123** button () and enter the **Downtime**



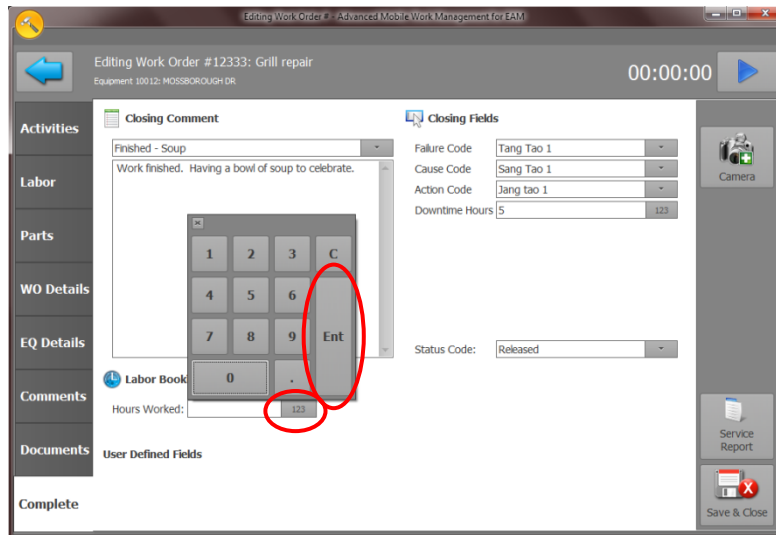
Specify Equipment Downtime

- ☞ Click the **Ent** button
- ☞ Select the **Status Code** drop-down () and select a **Status Code**



Select Status Code

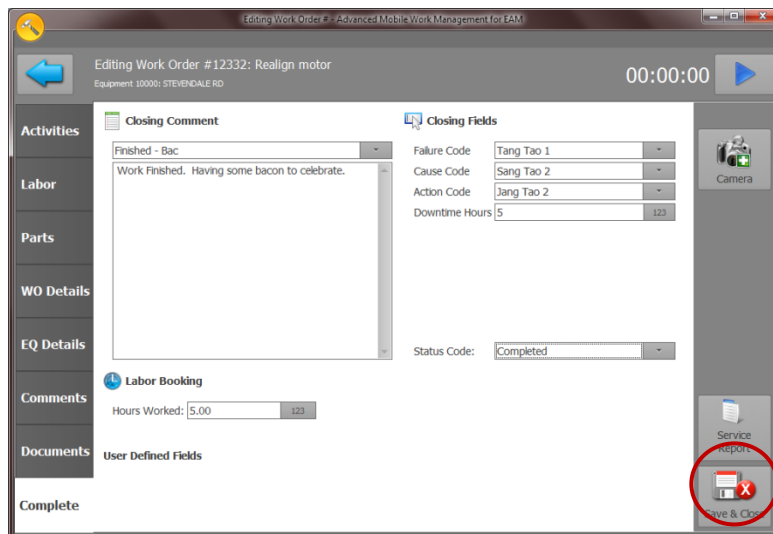
☞ Select the **Hours Worked 123** button () and specify the **Hours** worked



Enter Hours Worked

☞ Click the **Ent** button

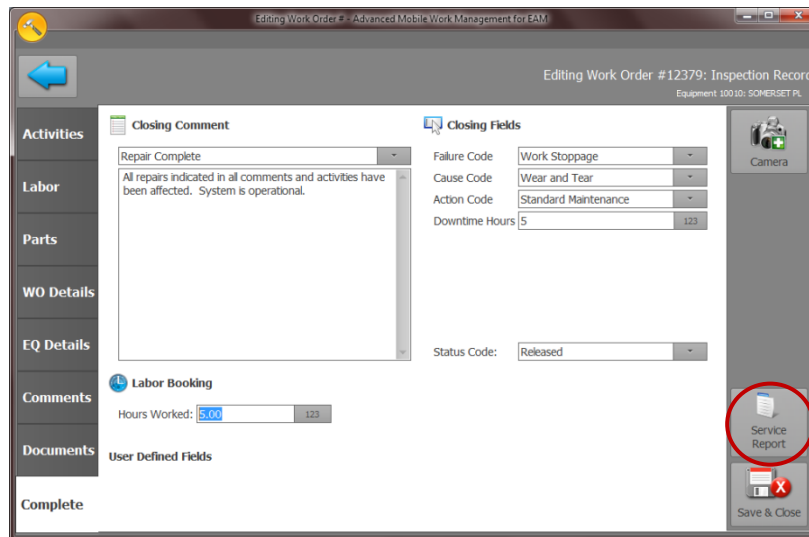
☞ Select the **Save & Close** button



Save & Close Work Order

Service Reports

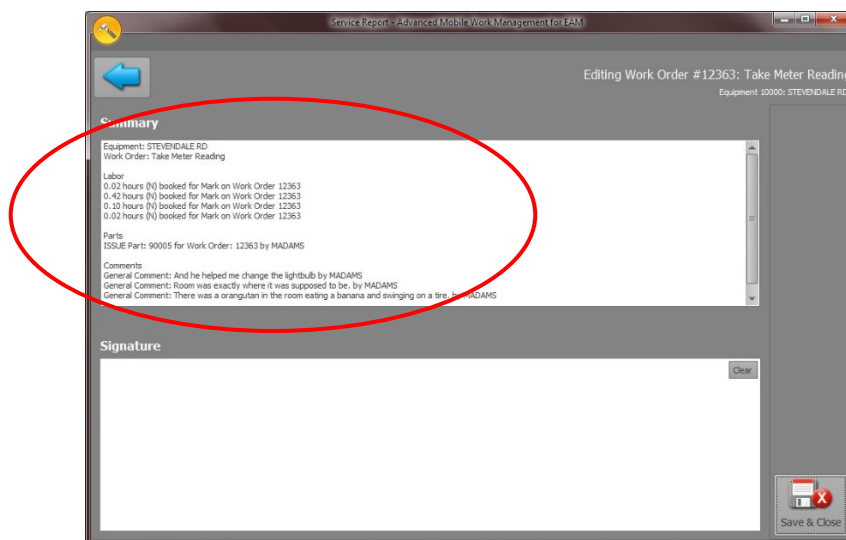
From the **Quick Close** screen, the user can bring up



Service Report Button

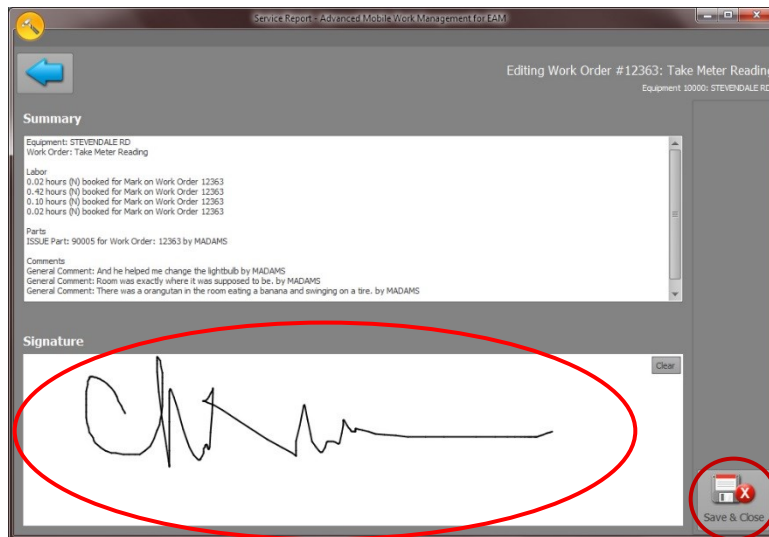
Click the **Service Report** button

The system will display all comments, parts and labor bookings for the Work Order



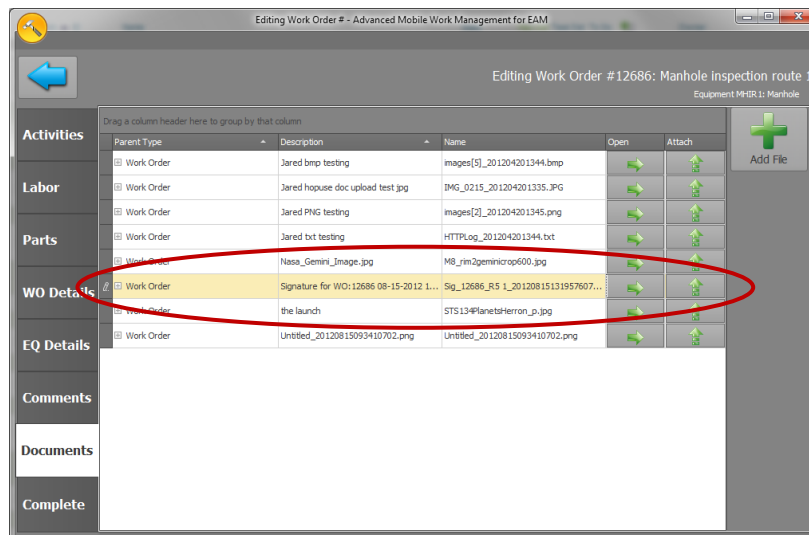
Service Report

- ☞ The user can sign the service report and then click **Save & Close** to complete the process



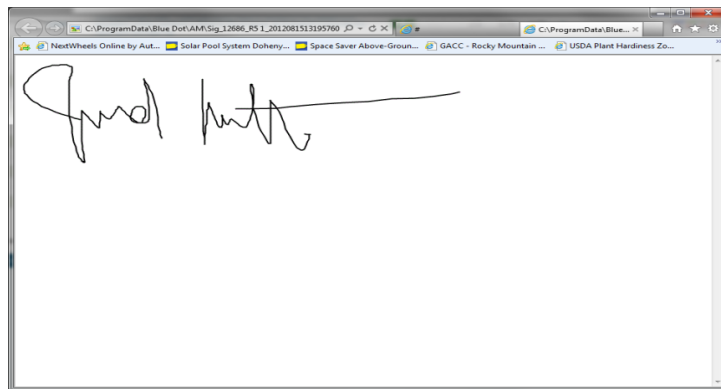
Service Report Signature

- ☞ From the Documents UI, you can see a signature saved there



Signature in Documents

- ☞ Opening a signature file attachment will display the file in the browser or default image viewer of the device

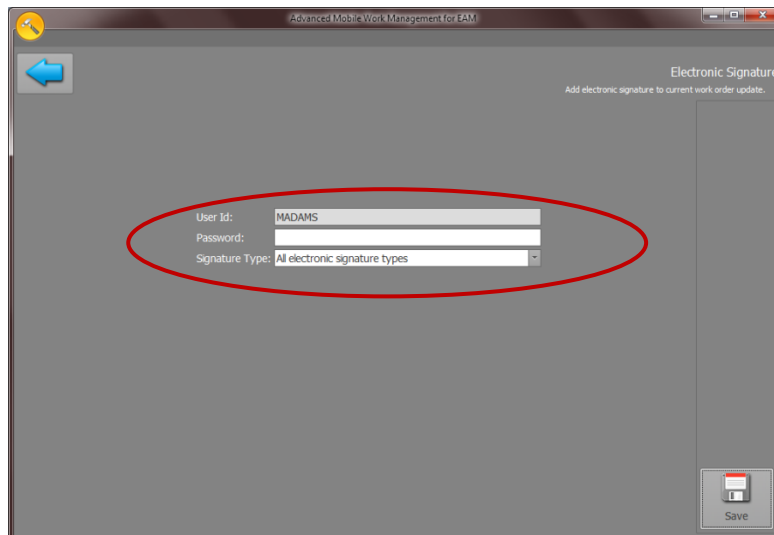


Viewable Signature

eSignatures

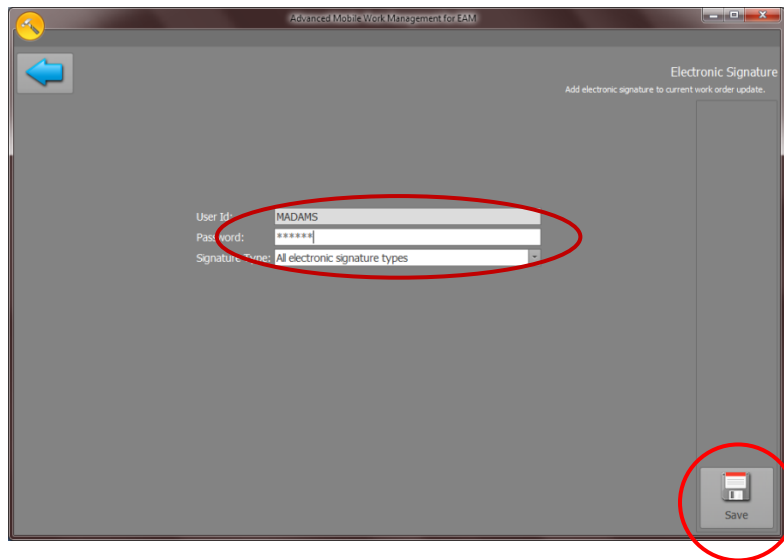
Your EAM Server and AM Admin Portal can be configured to require eSignatures that are compliant with **21 CFR Part 11 (Electronic Records and Electronic Signatures)**

- ☞ When configured, the system prompts for an eSignature when a WO is saved with a specific Status Code value (generally “Completed” or “Closed”)



eSignature UI

☞ The **USER** logged into the device cannot proceed without re-entering his or her **PASSWORD**



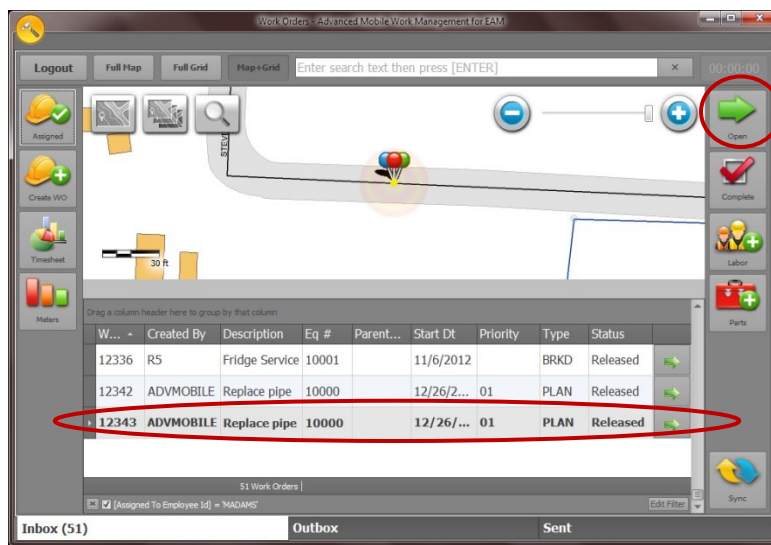
eSignature Complete

☞ Click **Save** to complete the process

Detailed Inspection Processing

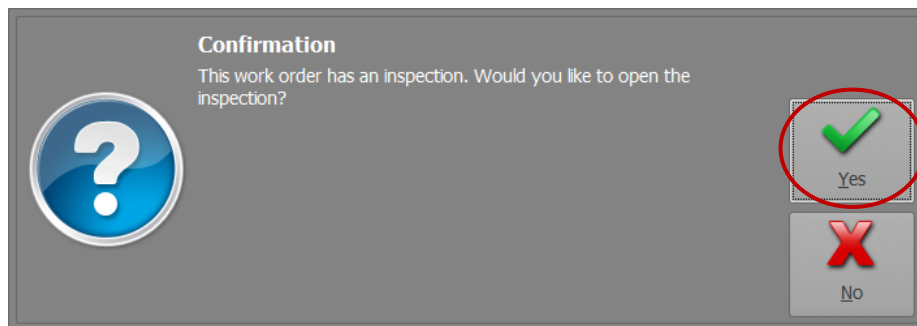
Not all Work Orders have an inspection component, but those that do will prompt you for whether or not you wish to enter the **Inspection** workflow.

- ☞ Double-tap the Work Order or select **Open** the work with a Work Order that has an inspection component



Inspection Work Order Ticket

- ☞ When prompted by the **Inspection Confirmation**, select **Yes**

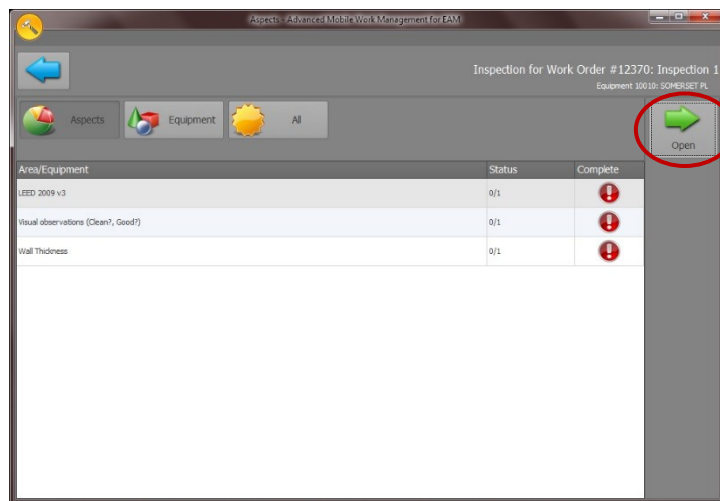


Inspection Processing Confirmation

Inspecting Aspects

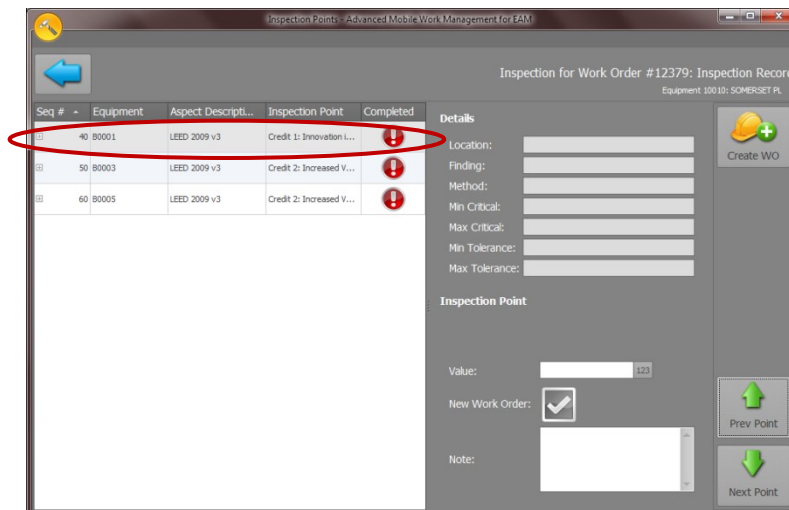
The system defaults to the **Areas** tab (a.k.a. **Aspects** in the **EAM Main Server**) and must have at least one entry but can have more than one.

- Select the **Open** button to expose the **Aspects Inspection Interface**



Inspection Area Main Screen

- Select the first **Inspection Point**



Inspections Area Management Screen

☞ You will be presented with either a **Value** or **Yes/No** inspection point (see below)

Value-Based Inspection Points

☞ Value-based screens have seven (7) fields of **Detail** data that are not editable and are defined either in the EAM Server or once the inspection point value has been populated

- **Location** – Where the reading is being taken
- **Finding** – Y/N value that is calculated based on the inspection point value you enter/select
- **Method** – Quantitative (a numeric value)
- **Min Critical** – The lowest acceptable value for the reading
- **Max Critical** – The highest acceptable value for the reading
- **Min Tolerance** – The lowest acceptable tolerance for the reading
- **Max Tolerance** – The highest acceptable tolerance for the reading

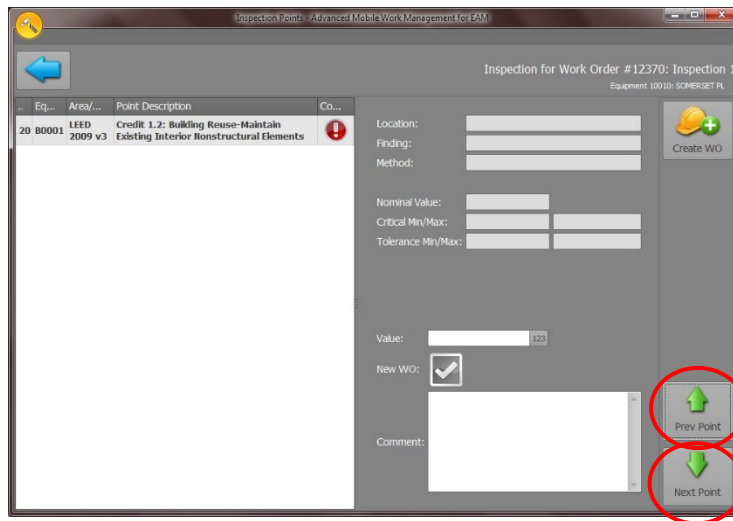
Value-Based Inspection Point Entry

☞ When filled in, the **Value** field, will automatically populate the **Finding** field with either **Yes** or **No** based on whether the value is within the minimum and maximum acceptable values

- ☞ The **Notes** field can be used to indicate any issues or additional information on the reading itself

Navigation

- ☞ Select the **Prev Point** button to move back to the previous **Inspection Point**



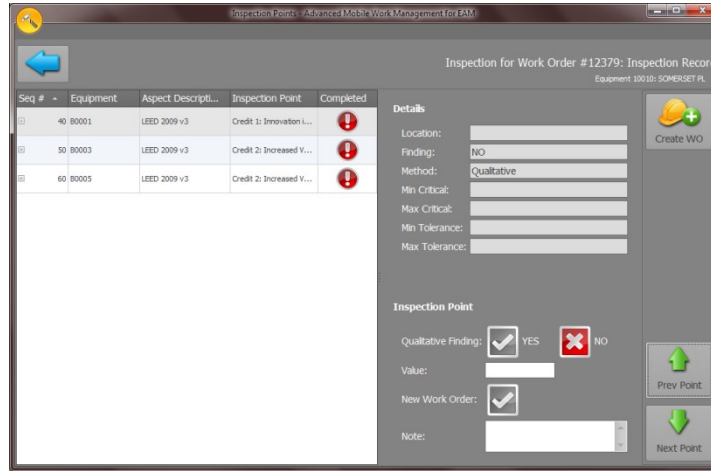
Moving Through Inspection Points

- ☞ Select the **Next Point** button to move on to the next **Inspection Point**

Yes/No-Based Inspection Points

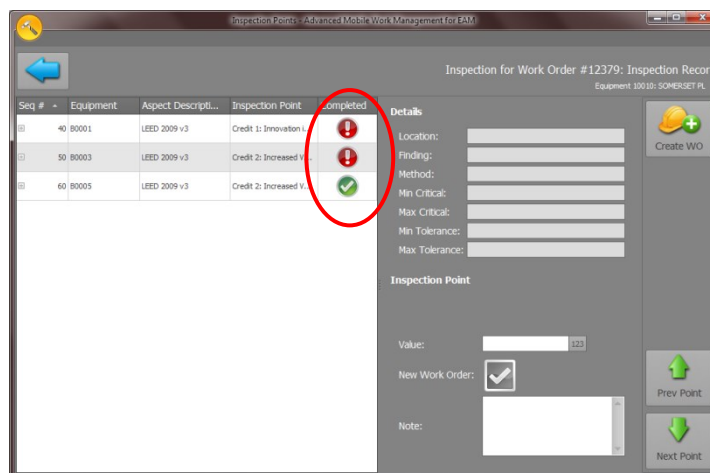
- ☞ Value-based screens have 7 fields of Detail data that are not editable and defined either in the EAM Server or once the value has been populated
 - **Location** – Where the reading is being taken
 - **Finding** – Y/N value reflecting the inspection point value entered
 - **Method** – Qualitative (a Yes/No value)
 - **Min Critical** – The lowest acceptable value for the reading
 - **Max Critical** – The highest acceptable value for the reading
 - **Min Tolerance** – The lowest acceptable tolerance for the reading
 - **Max Tolerance** – The highest acceptable tolerance for the reading

- The **Qualitative Inspection Point** requires either a **Yes** or **No** selection based on the inspector's judgment and populates the **Finding** field automatically



Yes/No Qualitative Inspection Point

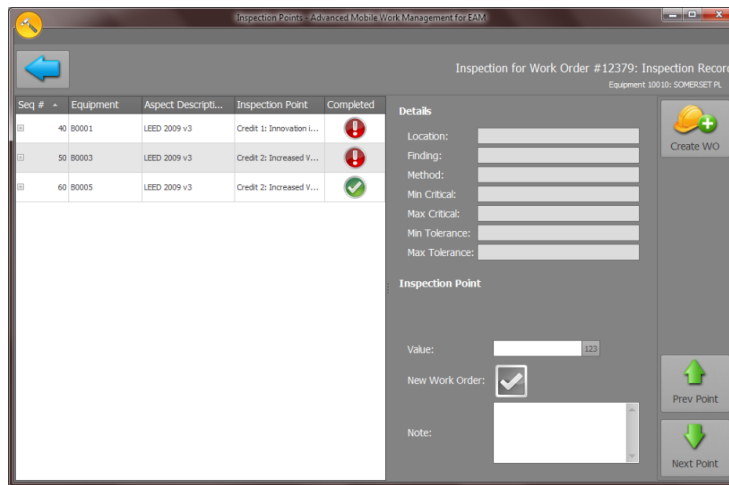
- ☞ The **Notes** field can be used to indicate any issues or additional information on the reading itself
- ☞ Regardless of whether the inspection point passed or failed the standard, the **Red Exclamation Point** (!) should turn to a **Green Check Mark** (✓)



Addressed Inspection Points

Navigation

- Select the **Prev Point** button to move back to the previous **Inspection Point**

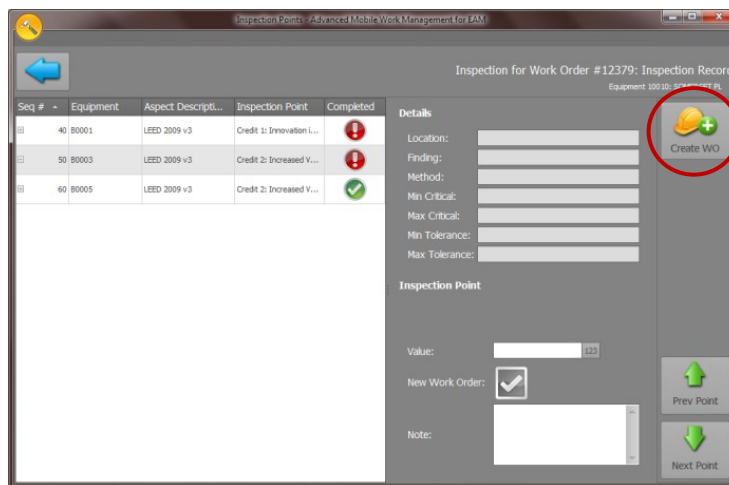


Moving Through Inspection Points

- Select the **Next Point** button to move on to the next **Inspection Point**

Inspection-Prompted Work Orders

- Should any inspection point require or prompt a new Work Order, you can select the **Create WO** button to create a new Work Order

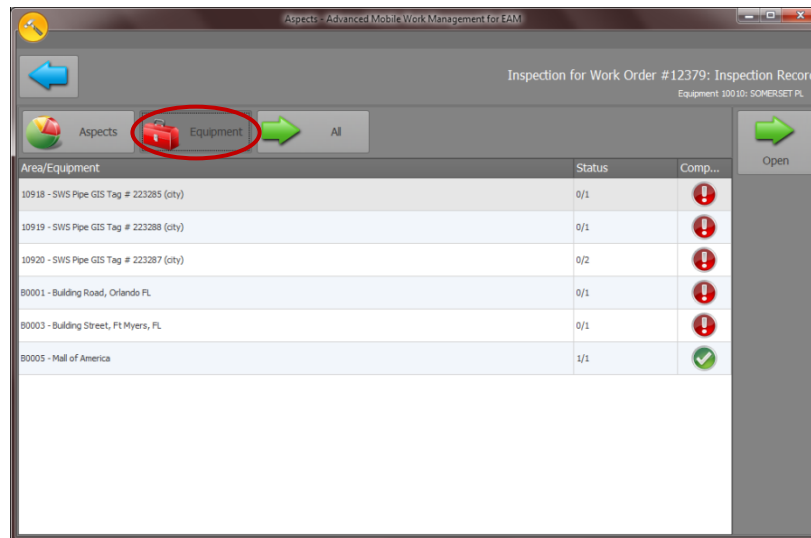


Create Work Order Button

- ☞ Please see **Creating Work Orders** on page **105** for detailed information

Inspecting Equipment

- ☞ Select the **Equipment** tab to review the inspection points based on the equipment to be inspected



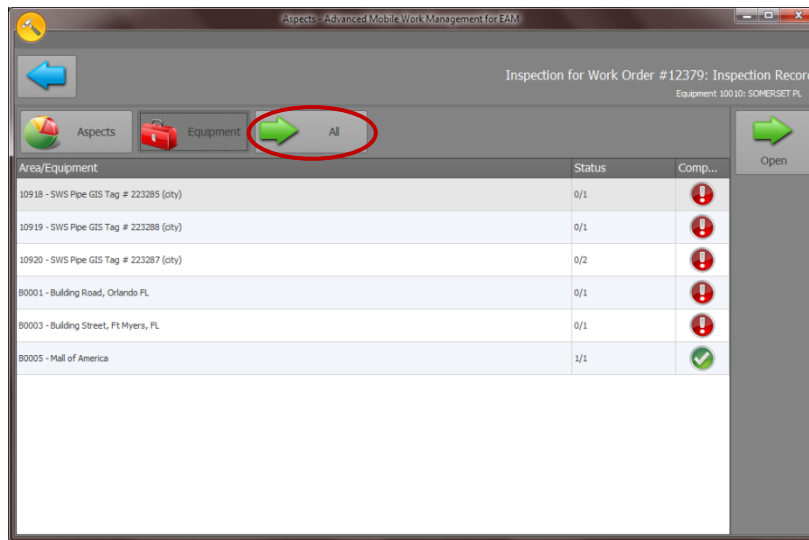
Equipment Inspection Main Screen

Note: *The Areas and Equipment Inspection tabs are merely filters for the available inspection points, and updating under either tab will be reflected under the other*

- ☞ Please see **Inspecting Aspects** on page **97** for detailed information on updating inspection points

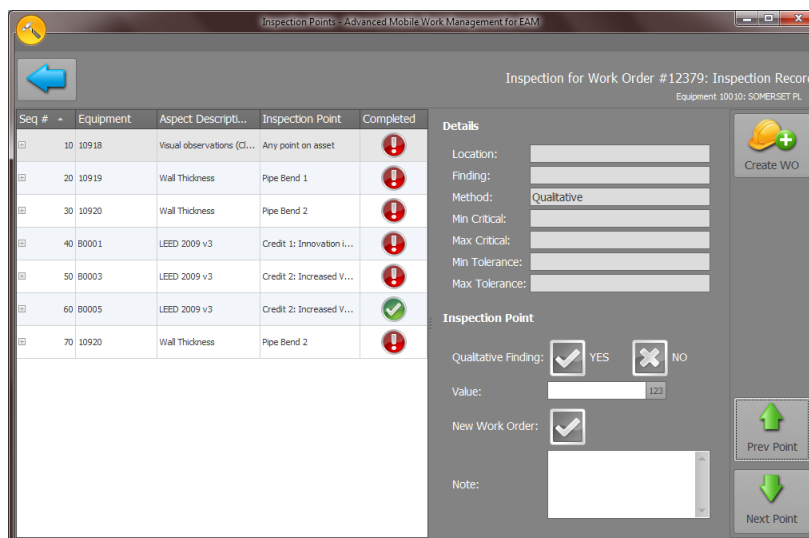
Inspecting All View)

Click the **All** tab to view all inspection points




All Inspections Tab

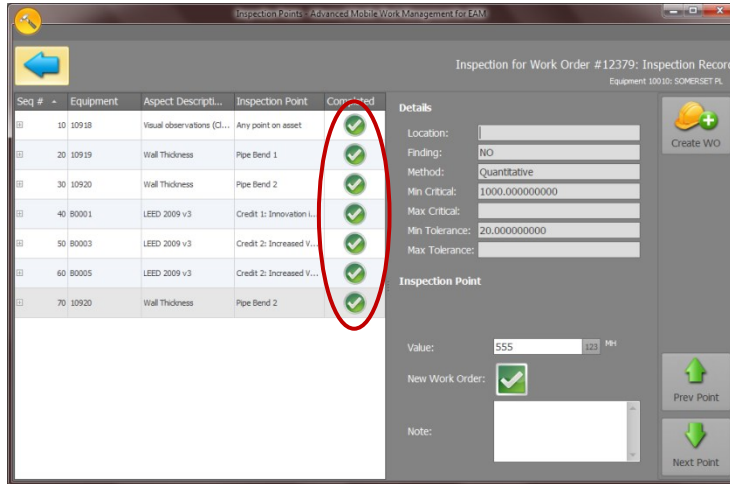
The system will display both **Aspect** and **Equipment** inspection points



All Inspection Point Main Screen

Inspection Completion

- ☞ All Inspection Points must be completed (i.e. have a **Green Check Mark** ) in order for the Work Order to be completed/closed out

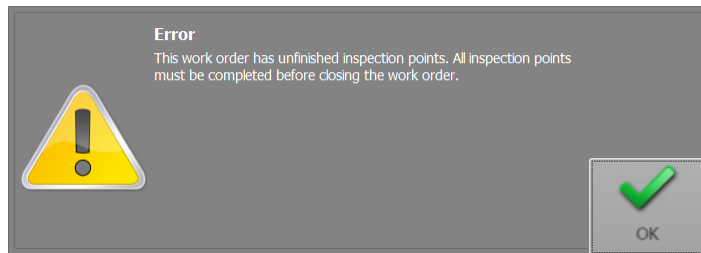


Completed Inspection Points

- ☞ Navigate to the main Work Order screen and refer to section **Completing Work Orders** on page 25

Inspection Incomplete Warning

- ☞ If you attempt to **Complete** and the Work Order without addressing all inspection points, you will receive an **Inspection Incomplete Warning**



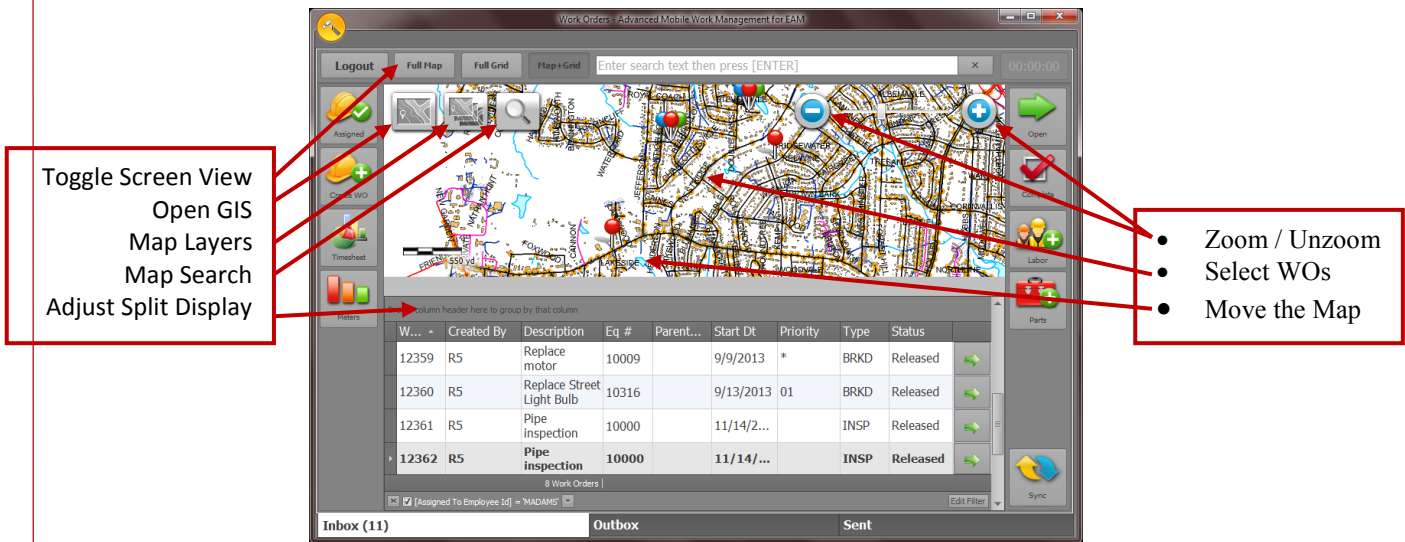
Inspection Incomplete Warning

- ☞ Return to the **Inspections Interface** and insure that all points are addressed

Working with GIS

Main Screen Functions

The GIS functionality provides tight integration between Work Orders and their geographic locations. This allows for enhanced route and scheduling as well as reduced time-to-job costs as technicians & deliveries know exactly where to go.

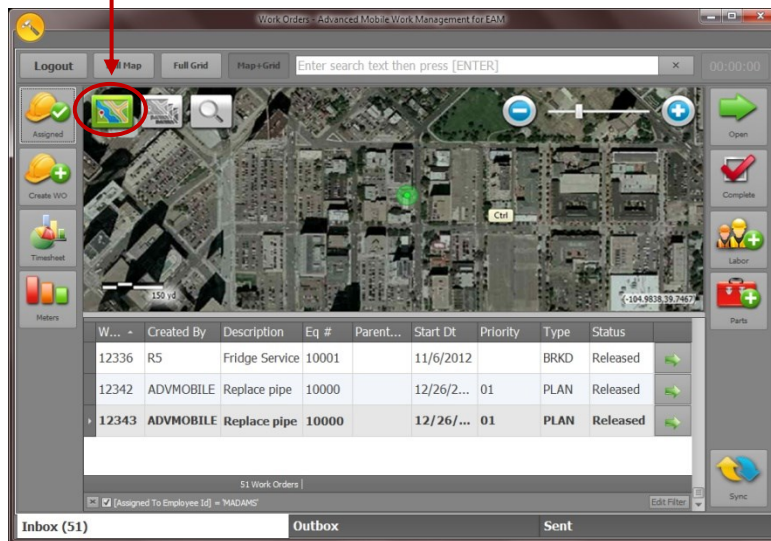


GIS Main Screen

Opening GPS

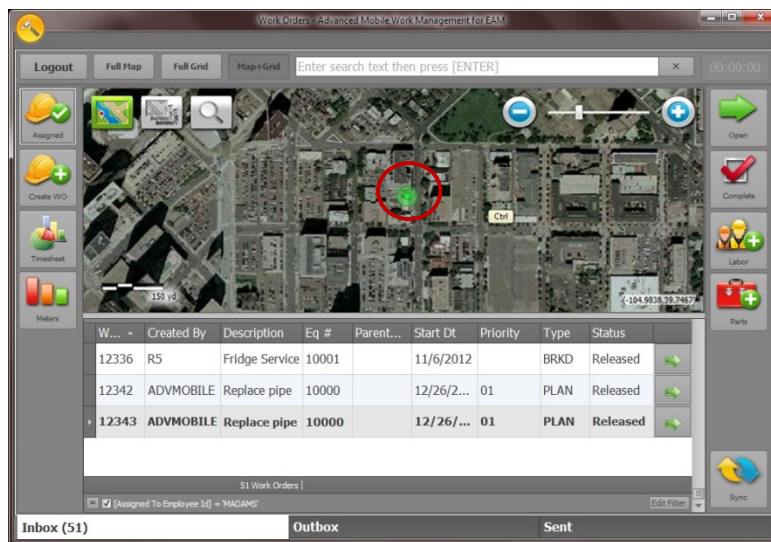
The **GPS button** allows you to identify your location on the map, but your device must be designed to identify itself via GPS coordinates in order for this functionality to work.

☞ Select the **GPS** button once to activate your GPS functionality



GPS View

☞ A green, pulsing dot will appear on the map to indicate your location



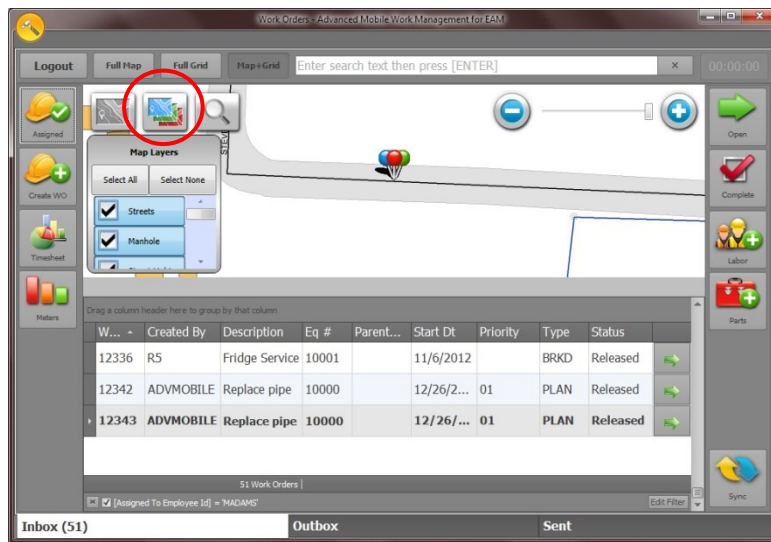
Active Location Display Via GPS

☞ While the function is on, the dot should stay on the screen and allow you to guide your position in relation to and towards the desired Work Order

Map Layers

The selection of layer options for your map environment will be different from customer to customer. For example, the personnel from a power company would see overhead or underground power lines identified on their maps, whereas public works personnel might see water and sewer lines.

☞ Select the **Map Layers** button to access the **Map Layers** interface,

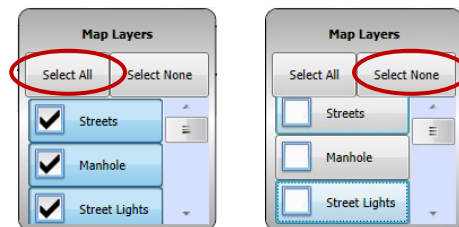


Selecting Map Layers

NOTE: The default display has all layers selected

Select Layers

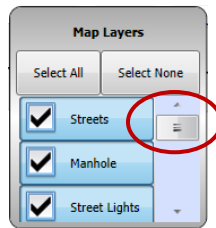
☞ You can use the **Select All** or **Select None** buttons or to work with the layers



Select All Layers Button

Scrolling

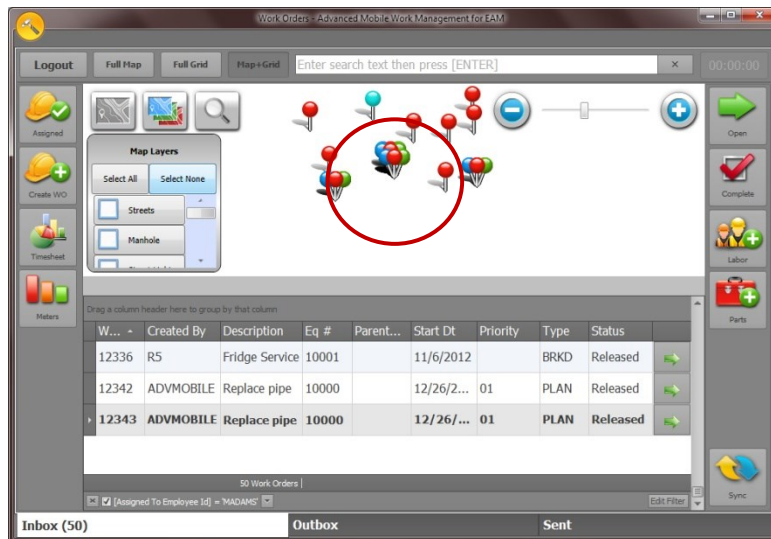
☞ To scroll through the list of all layers, use the scrollbar



Map Layers Scrollbar

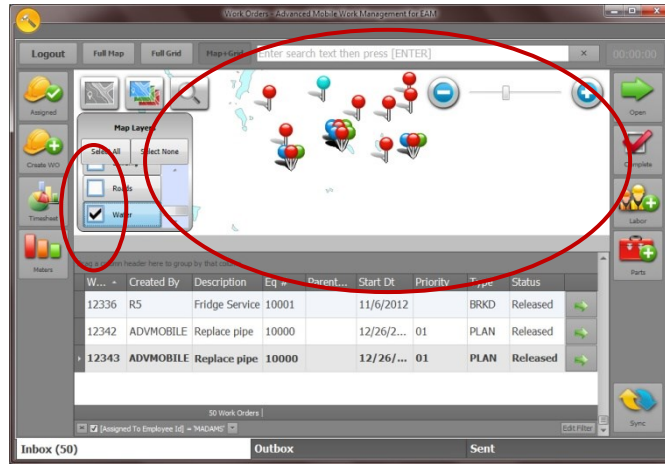
Layering Displays

☞ After selecting the **Select None** button, you will see only the **Available Work Orders** displayed as pins on the map



Map of All Layers Deselected

☞ Select a **Layer** to display that layer on the **Map Display**



Single Map Layer Selected

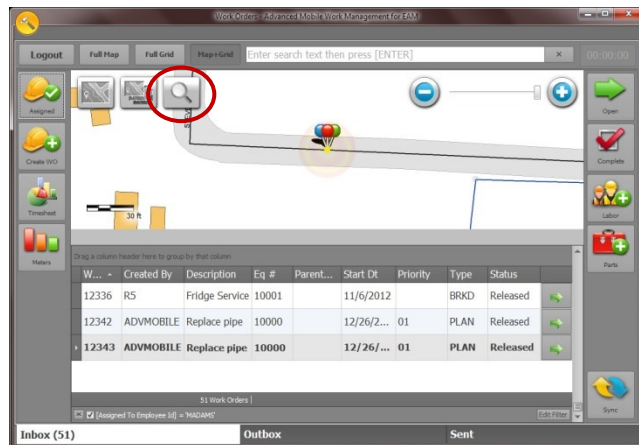
☞ Keep selecting and deselecting layers to get the view you need

NOTE: Layers will only display in the order they are listed in the Map Layers UI, and the order cannot be changed.

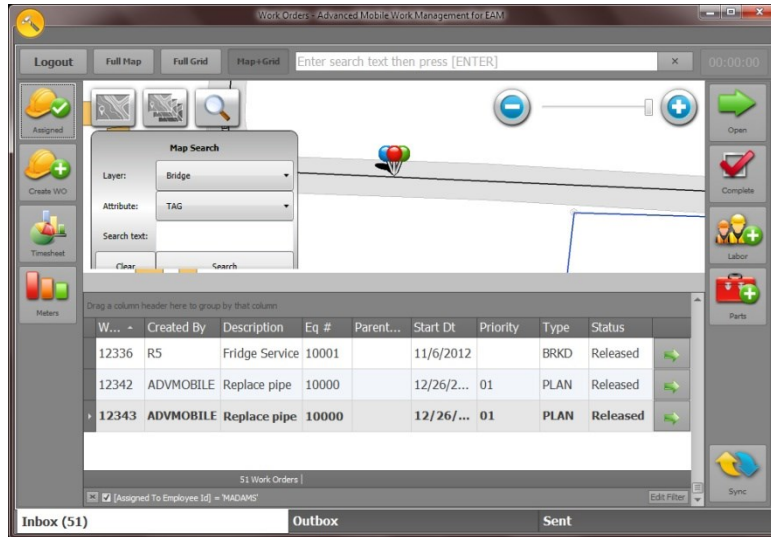
Map Search

You can search on a number of parameters within any map.

☞ From the main screen, select the **Map Search** Button

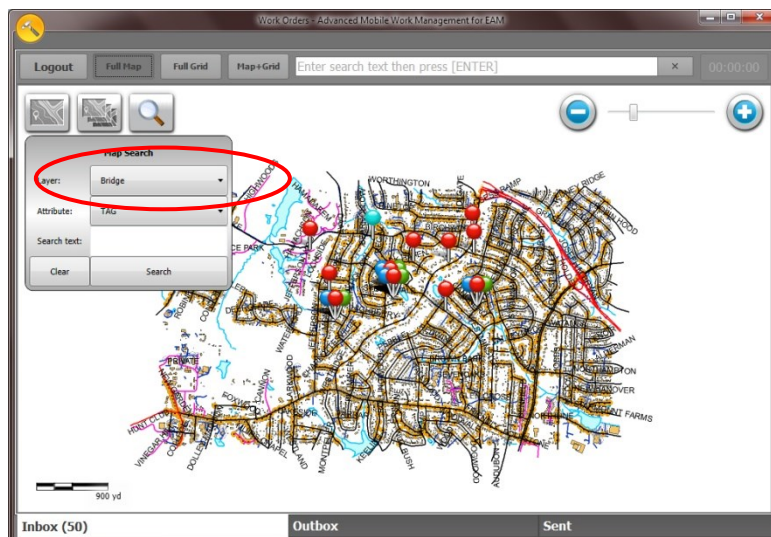


Map Search UI Button



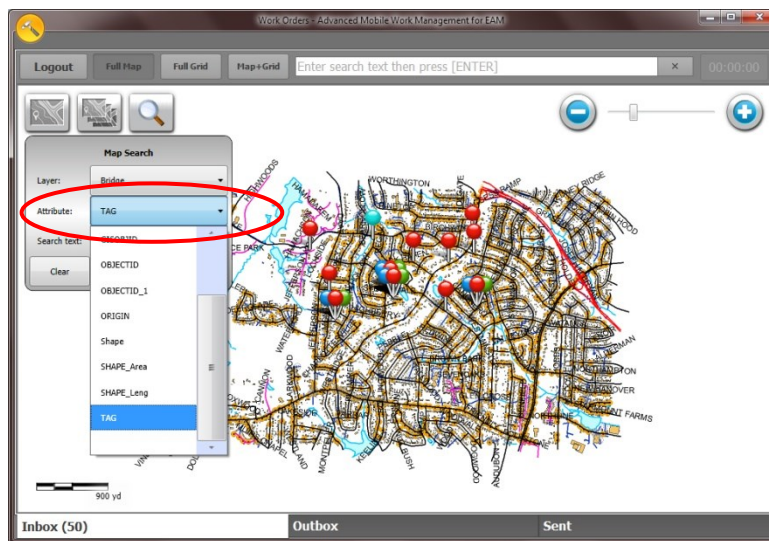
Map Search UI

- ☞ This will expose the **Map Search** interface
- ☞ It is recommended that you click **Full Map** to work with this interface
- ☞ To change the layer in which you need to search, select the desired value from the **Layer** dropdown



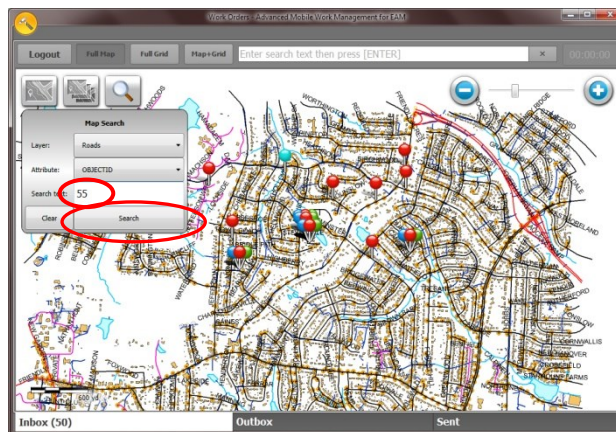
Map Search UI – Select Layer

- ☞ To change the attribute against which you need to search, select the appropriate value from the **Attribute** dropdown



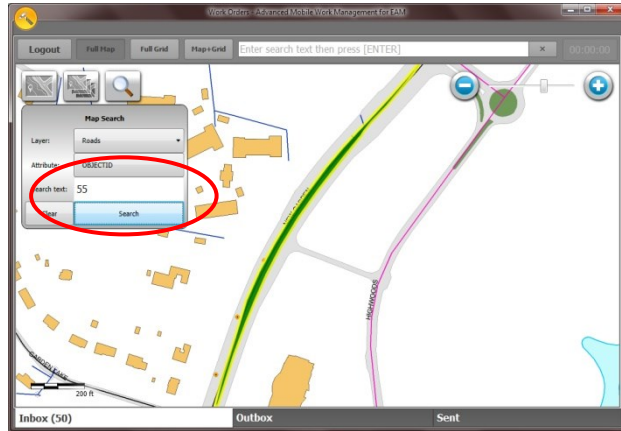
Map Search UI – Select Attribute

- ☞ Enter the search criteria in the **Search Text** box



Map Text Search Box

- ☞ Select the **Search** button
- ☞ The system will match the search criteria if it exists and, where appropriate, move the image and zoom accordingly to the returned search result



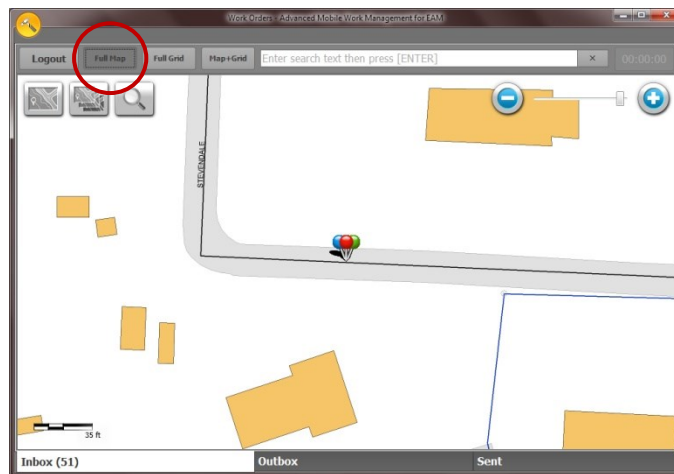
Map Text Search Results

Select View Toggle

Full Map View

The full map view allows the user to expand the map view to the entire screen.

☞ In order to go to the full map view, select the **Full Map** button

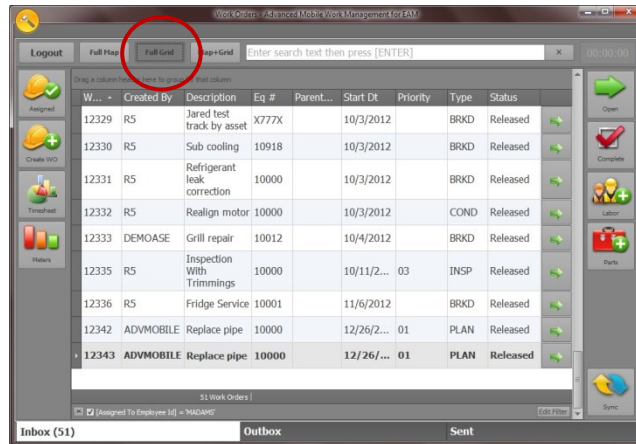


Full Map View

Full Grid View

The full grid view displays Work Orders in a grid view to manage larger lists.

☞ In order to go to the full grid view, select the **Full Grid** button to

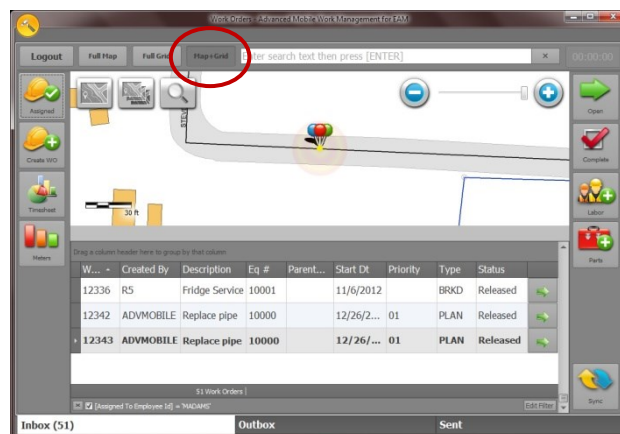


Full Grid View

Default View

The default “split screen” view allows you to see and manipulate the map while still seeing a grid of the current user’s Work Orders.

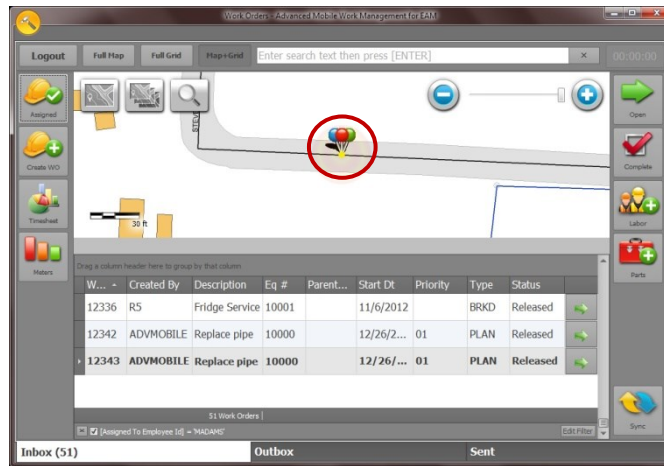
☞ In order to go to return to the Default (Map + Grid) view, select the **Map + Grid** button



Default GIS View

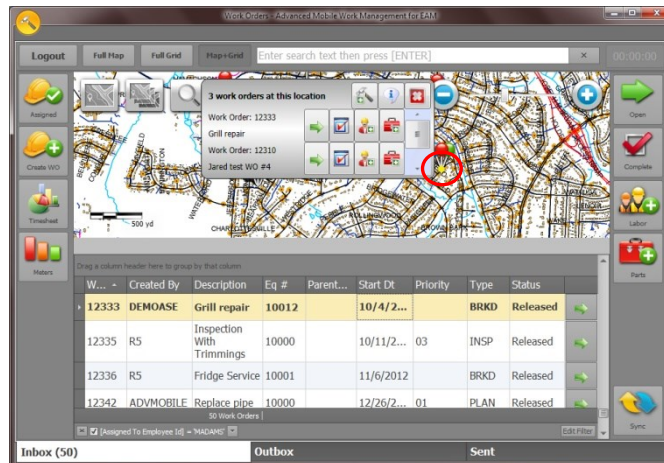
Selecting Work Orders

The pins displayed on the map indicate the locations of Work Orders. The color of the pins is configurable by your system administrator to indicate several different kinds of information.



Main Screen Pin Selection

☞ So select a Work Order via the pin, touch the base of the pin to expose the **Work Order** selection UI

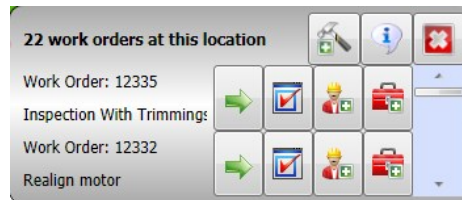


Pin-Selected Work Order Screen








☞ A list of one or more Work Orders will be displayed in the **Work Order** UI

Pin Selected Work Order UI

The pin-selected Work Order UI will allow you to view multiple Work Orders and then select the function you need to access.



Pin Selected Work Order Interface

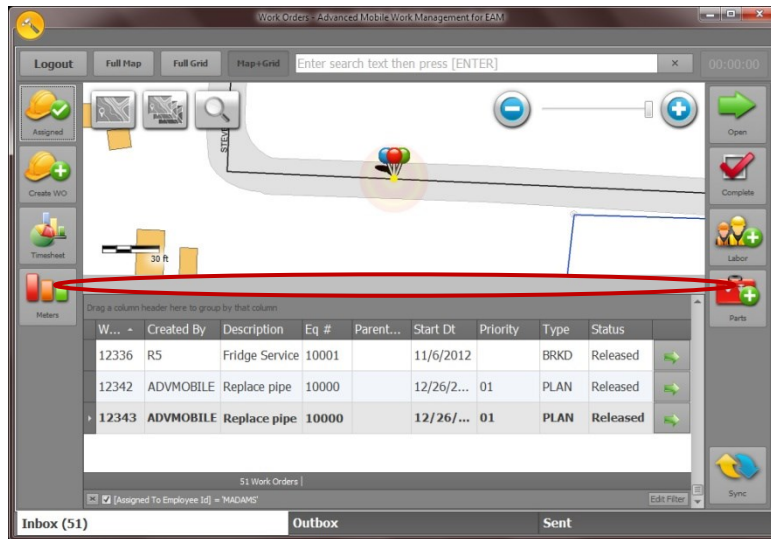
- ☞  Creates a New Work Order
- ☞  Displays the Assets UI allowing searches on the attributes of each asset
- ☞  Closes the Work Order UI
- ☞  Opens the selected Work Order
- ☞  Opens the Add Labor UI for the selected Work Order
- ☞  Opens the Parts UI for the selected Work Order
- ☞  Opens the Quick Complete UI for the selected Work Order.

Adjusting the Screen View

Split Screen Adjustment

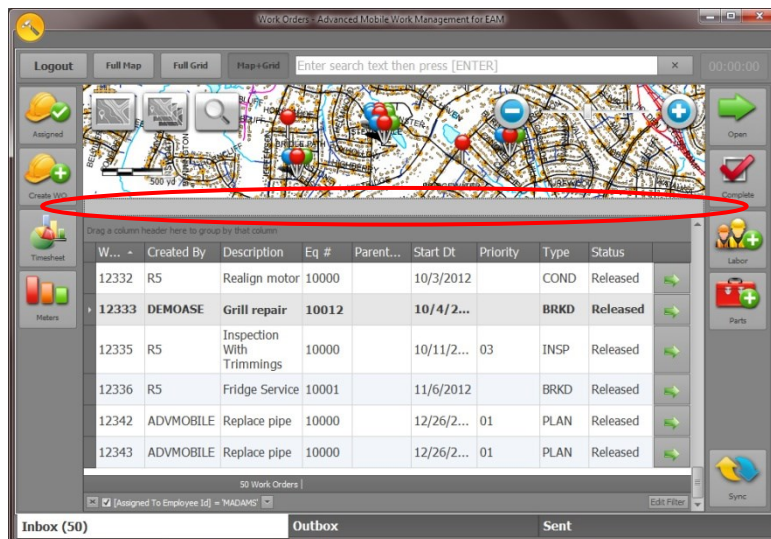
The View adjustment bar will allow you to increase or decrease the map and the grid view respectively on a split screen view.

☞ Select and hold on the gray **Split Screen Adjustment Bar**



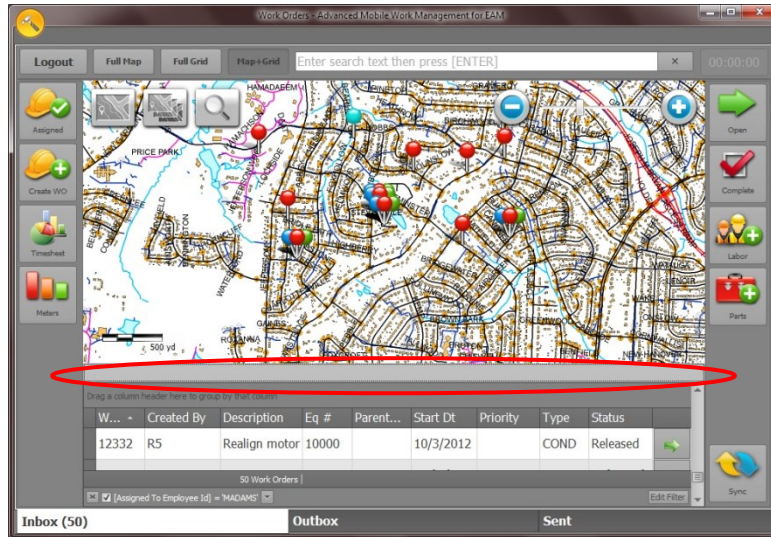
Split Screen Adjustment Bar (Default)

☞ Drag the bar up to expose more of the Work Order Grid




Split Screen Adjustment Bar (Raised)

☞ Drag the bar down to expose more of the **Map**





Split Screen Adjustment Bar (Lowered)

Zoom / Unzoom View

☞ Hold and drag the scroll bar () to the left to zoom out and to the right to zoom in



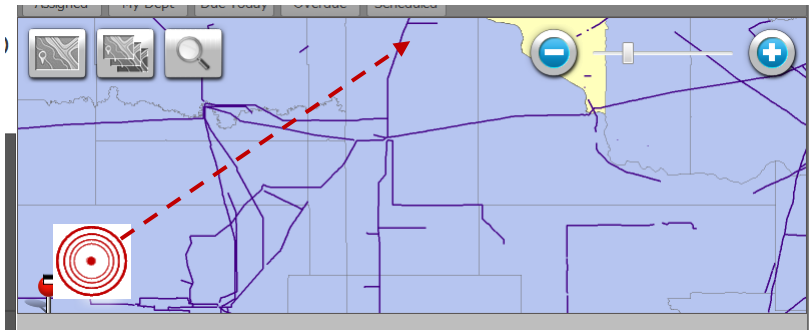
Zoom Controls

☞ Tap the  button to zoom out one step at a time and the  to zoom in one step at a time

Moving the Map

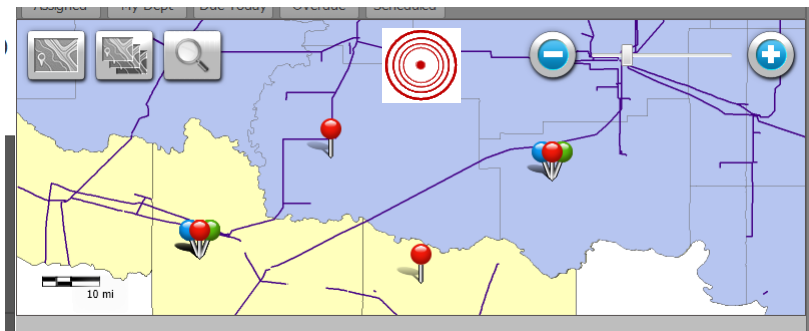
☞ When dealing with large maps where you still want to see detail, you may need to move the map around to focus on one or more specific Work Orders or map details

- ☞ Touch the screen in one of the corners of the map and drag your finger in the direction you want to move the display



Initial Position of Map


- ☞ Remove your finger when the map is in the correct position

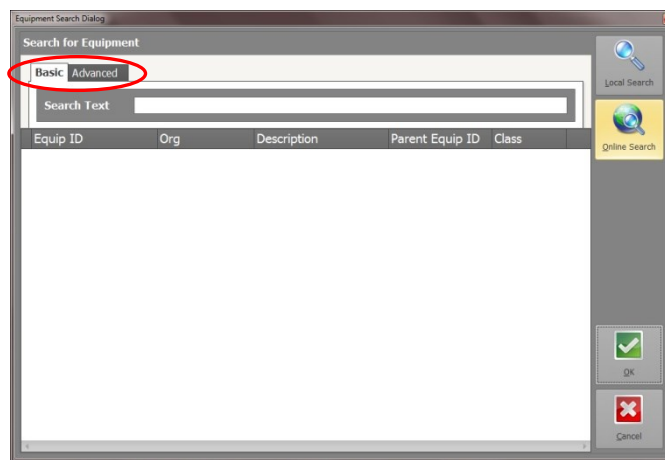


Map Moved to Display New Area

- ☞ You can keep moving the map in any direction, but the map will stop moving when you reach any edge of the map

Creating Work Orders

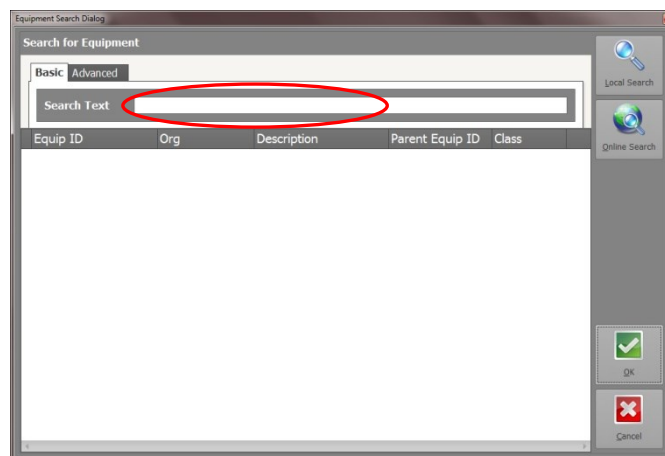
- ☞ The **Create WO** button () will always bring you to the screen below:
- ☞ You can perform either a **Basic Search** detailed below or an **Advanced Search** detailed on page 121



Selecting Basic or Advanced Equipment Searches

Basic Search

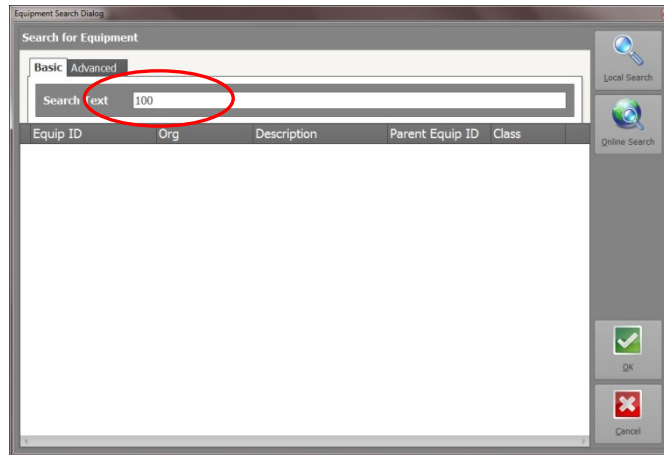
- ☞ Place the cursor in the **Search** text box and hit the **Enter** button on the device to display all **Local** equipment records



Default Full Basic Search (Local)

OR

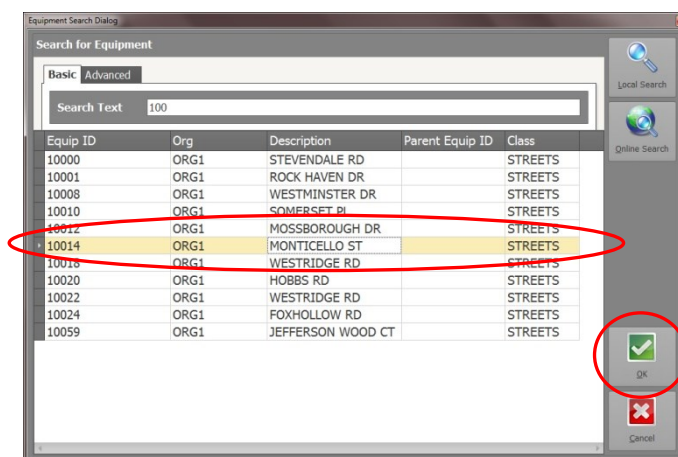
- ☞ Enter your search criteria in the **Search** text field and click the **Local Search** or **Online Search** button



Entering Partial Search Criteria

NOTE: You can enter one or more characters, and the system will display all matches

- ☞ Select the desired record from the results or perform another **Local** or **Online** search



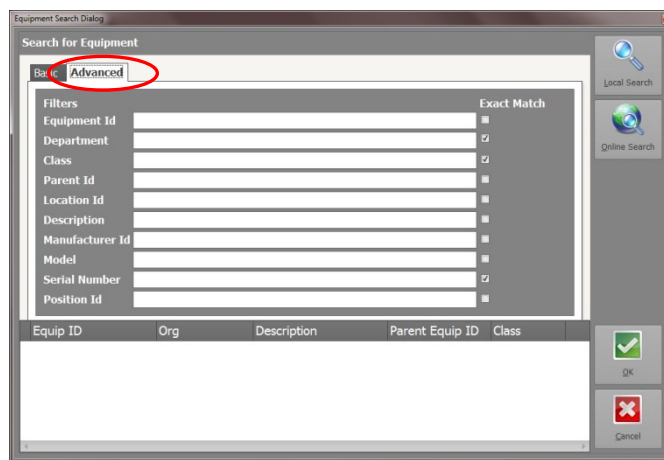
Selecting Equipment from the Search Results

- ☞ Click **OK**

- ☞ The system will return to the Meters page and auto-populate the values of your selection into the appropriate fields
- ☞ Proceed with the **Adding a Meter Reading** section on page 43

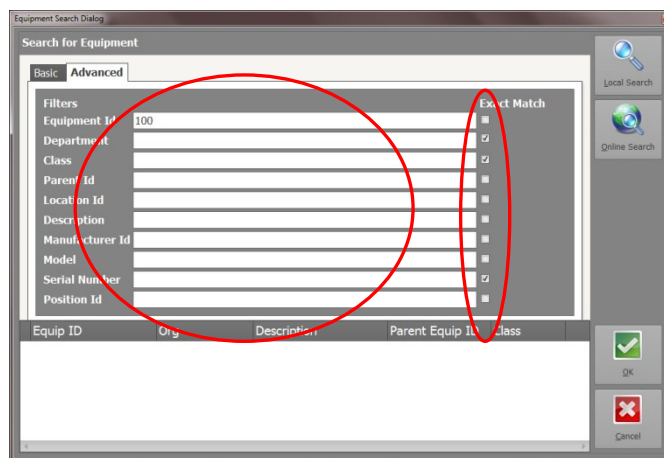
Advanced Search

- ☞ Click the **Advanced** tab



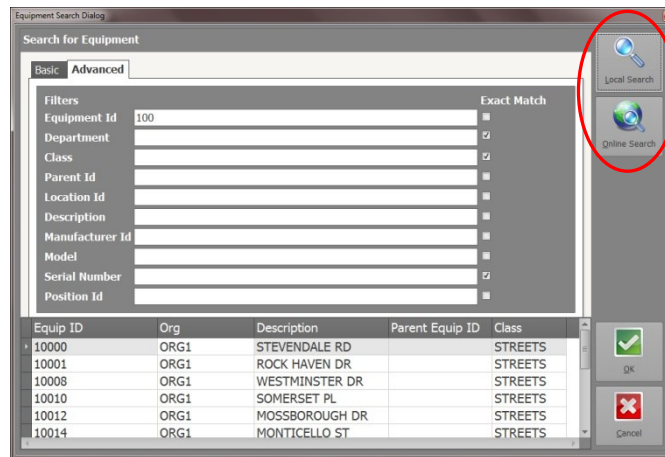
Advanced Equipment Searches

- ☞ Populate one or more of the **Advanced** search fields with the desired search criteria



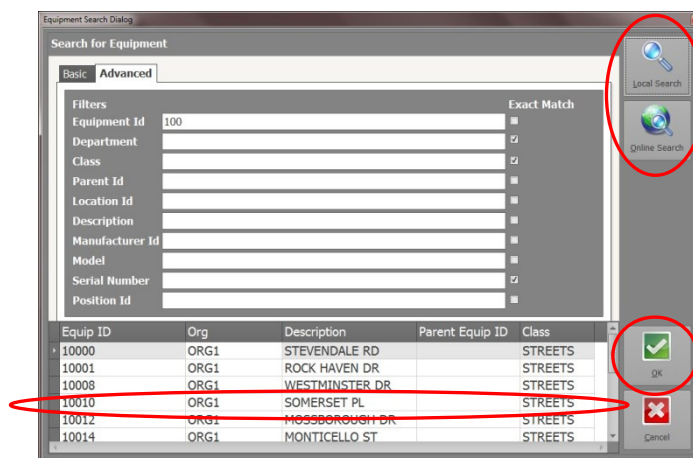
Specifying Advanced Search Criteria

- ☞ Wherever applicable, check the **Exact Match** box to limit the search results returned by the system
- ☞ Hit the **Local** or **Online** Search button



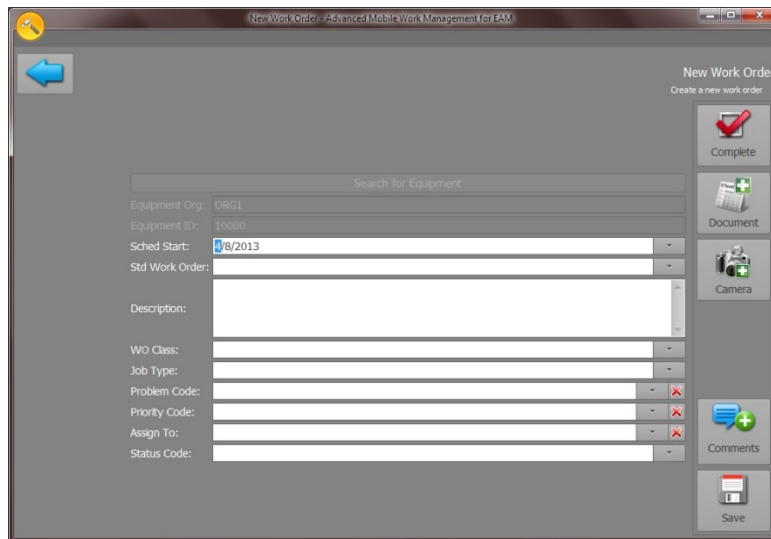
Advanced Search on Specific Criteria

- ☞ Select the desired record from the results set or perform another search



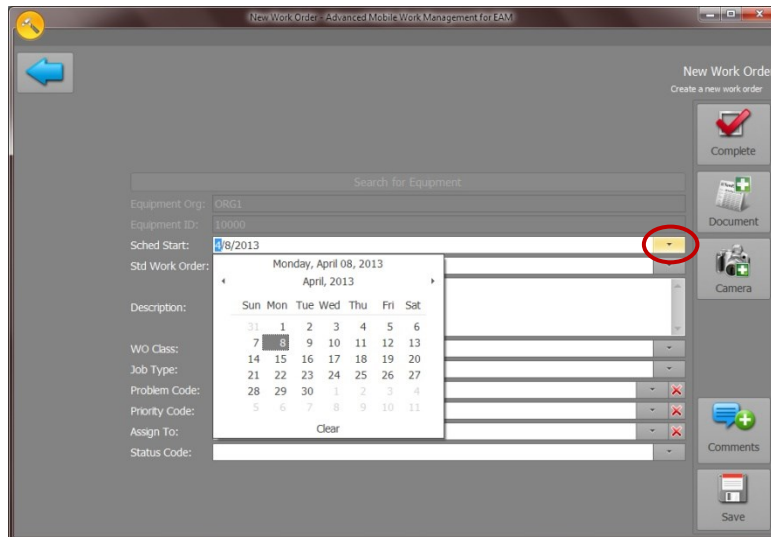
Selecting Basic or Advanced Equipment Searches

- Click the **OK** button and the system will return you to the **New Work Order** screen



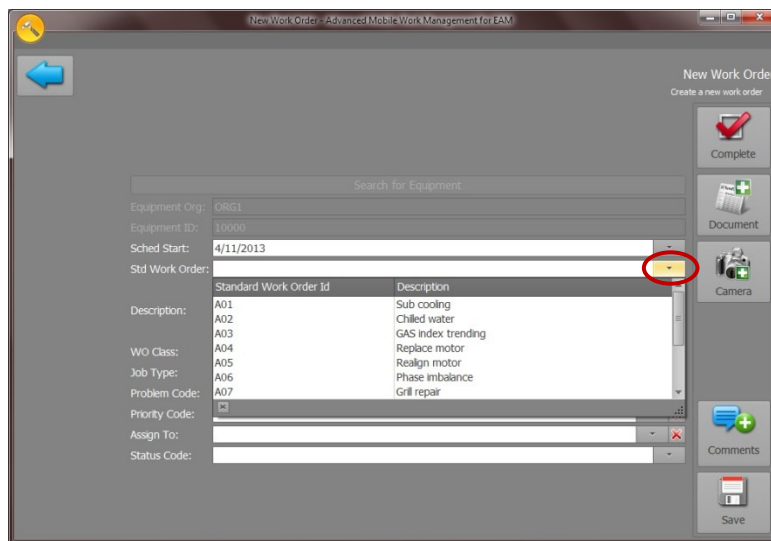
New Work Order Main Screen

- Specify the desired **Start Date** by typing it in or via the **Calendar**



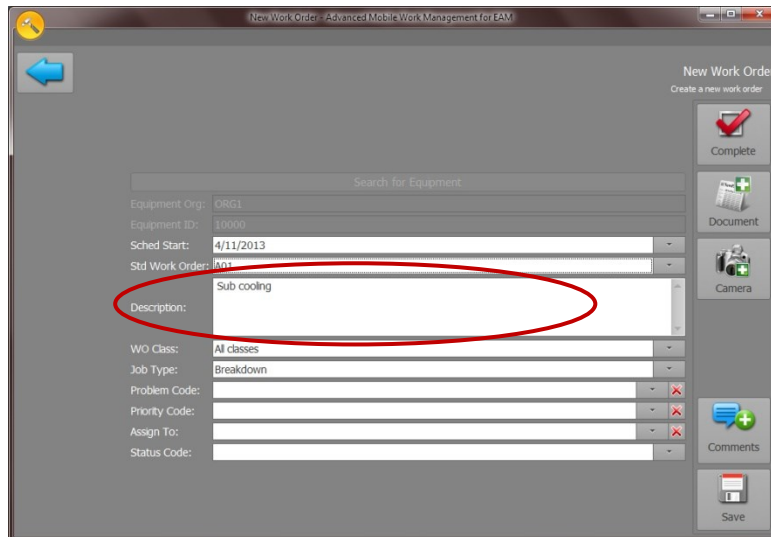
Specifying New Work Order Start Date

- ☞ Select the **Standard Work Order** drop-down and select the kind of work to be performed



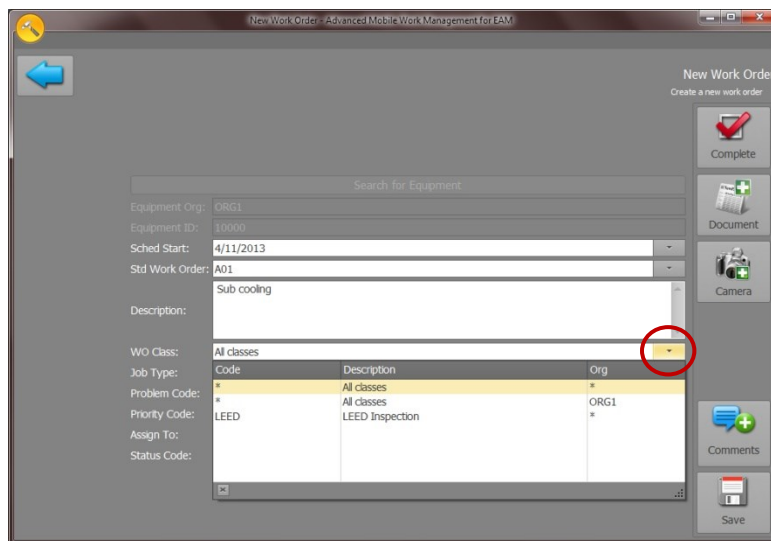
New Work Order Work Type Selection

- ☞ The Description field should be auto-populated



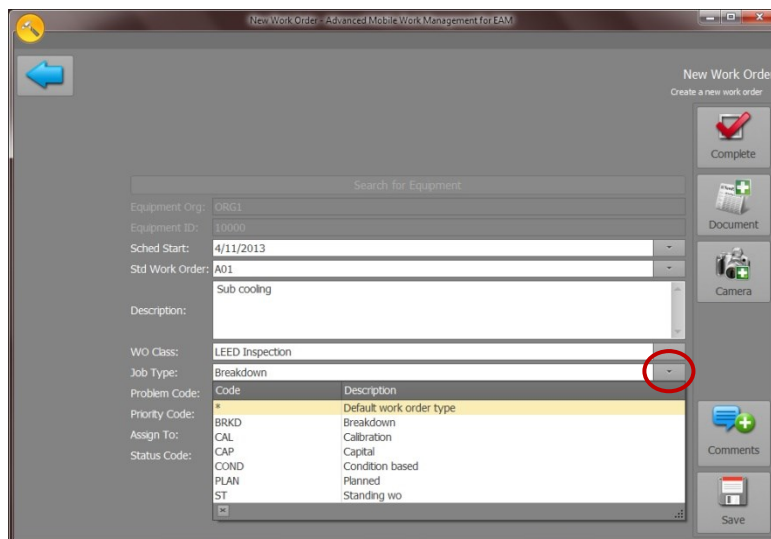
New Work Order Work Type Description

- ☞ If applicable, select the **WO Class** for and select the appropriate value **from the drop-down**



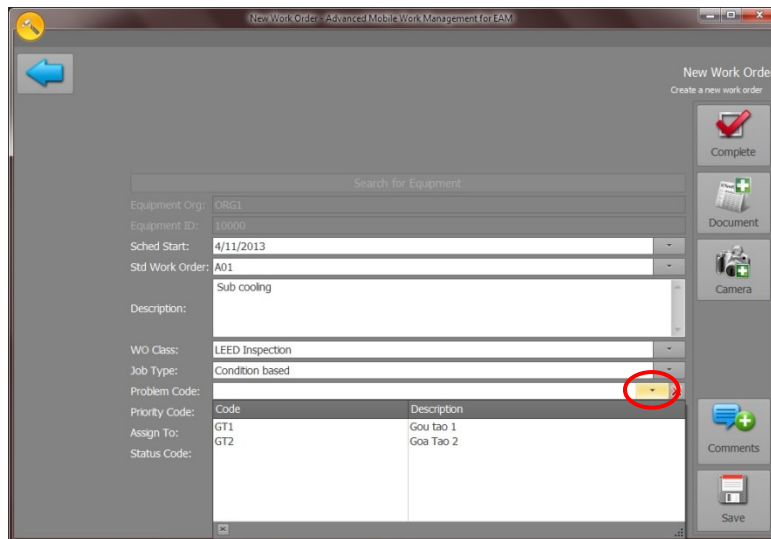
New Work Order WO Class Selection

- ☞ Select the **Job Type** drop-down and select the appropriate code for the work to be performed



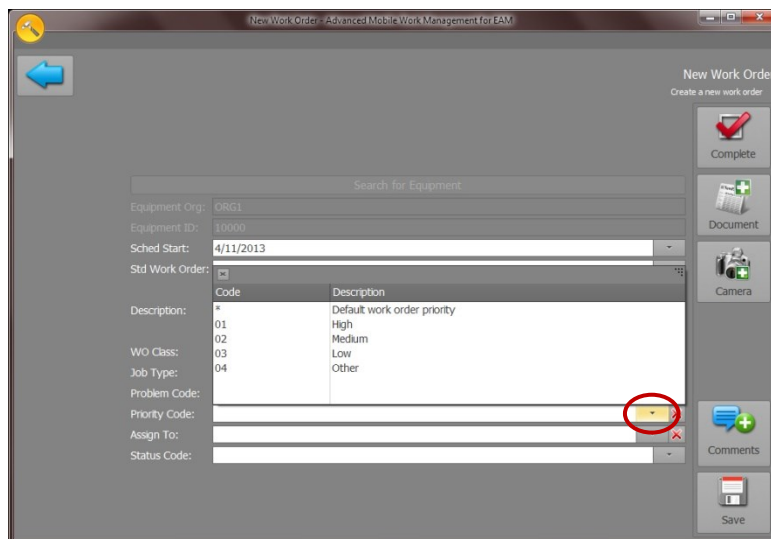
New Work Order Job Type Selection

- ☞ Select the **Problem Code** drop-down and select the appropriate code for the work to be performed



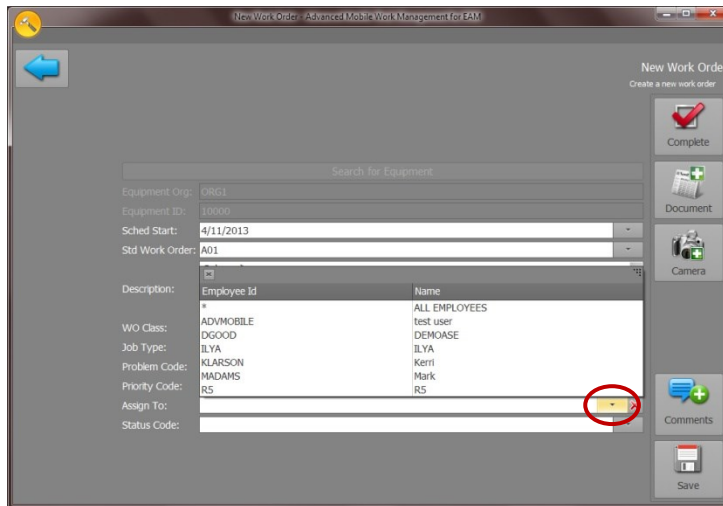
New Work Order Problem Code Selection

- ☞ Select the **Priority Code** drop-down and select the code for the work to be performed



New Work Order Priority Code Selection

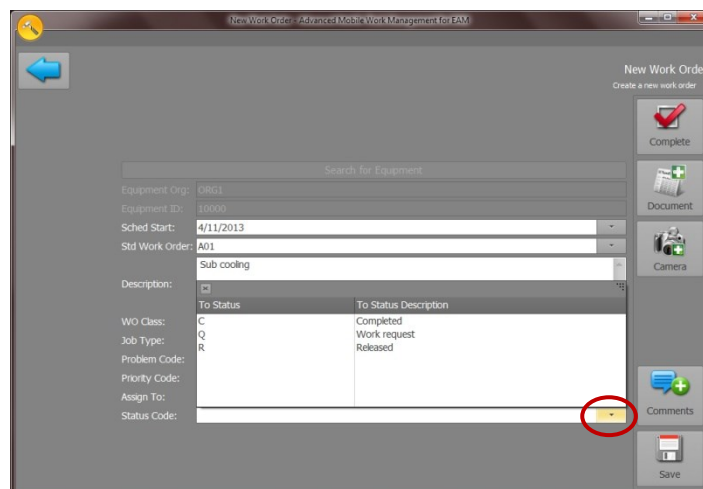
☞ If available and applicable, select the **Assign To** value from the drop-down



New Work Order Assigned To Selection

NOTE: The Assign TO field, as shown in these screen captures, may or may not be available to any or all users. It must be configured in the Advanced Mobile Admin Portal. Please see your System Administrator if you require this functionality.

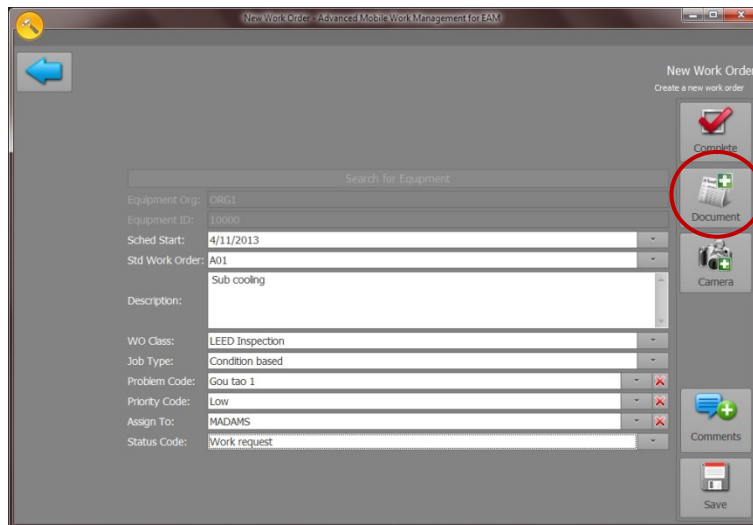
☞ Select the **Status Code** drop-down and select the code for the work to be performed



New Work Order Status Code Selection

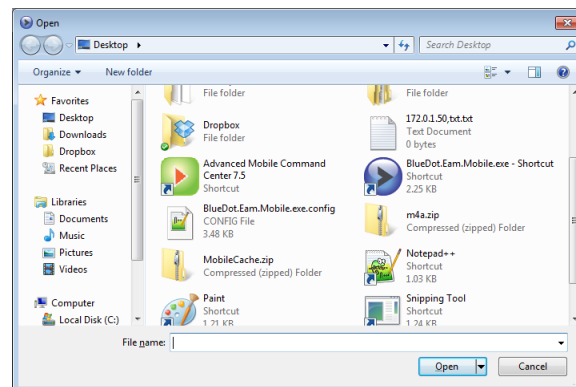
Document Attachments

☞ Click the **Document** button



Document Attachment Button

☞ Select the document from the **File Select UI**



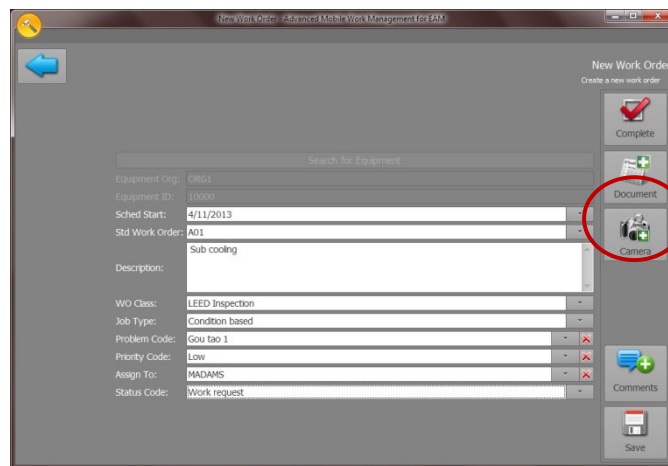
File Selection UI

☞ Click **Open**

☞ The document will be attached to Work Order automatically

Taking Pictures

☞ Click the **Camera** button



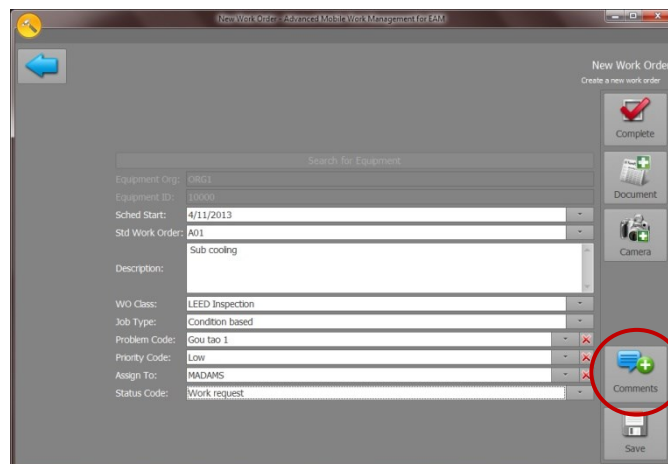
Camera Button

☞ If your system is configured properly, the device **Camera UI** will come up and you can capture pictures that will be attached to Work Order automatically

NOTE: *Specifics are not detailed here as interfaces vary from device to device.*

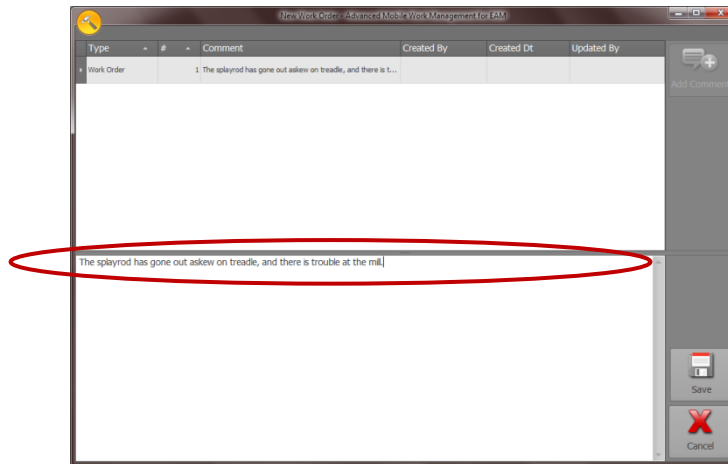
Comments

☞ Users can include comments by clicking the **Comments** button



New WO Comments Button

☞ At the **Comments** screen, click in the text area and create the new comment

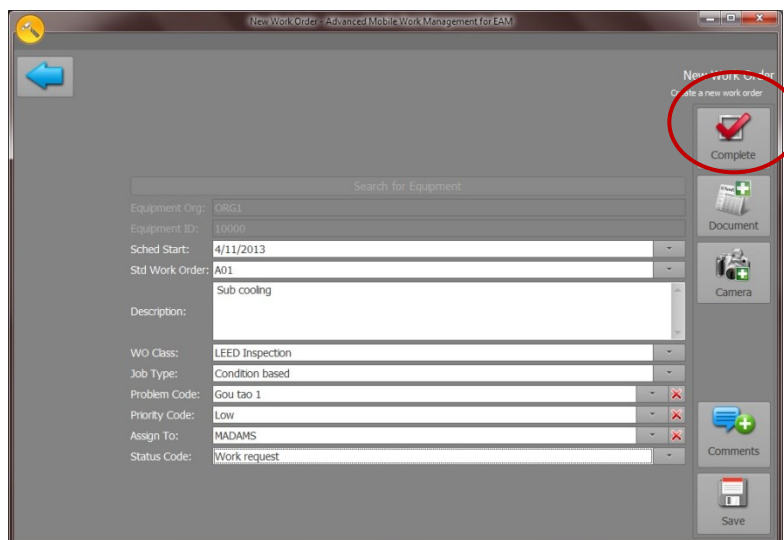


New WO Comments Entry

☞ Click the **Save** button and the system will return you to the Create Work Order screen

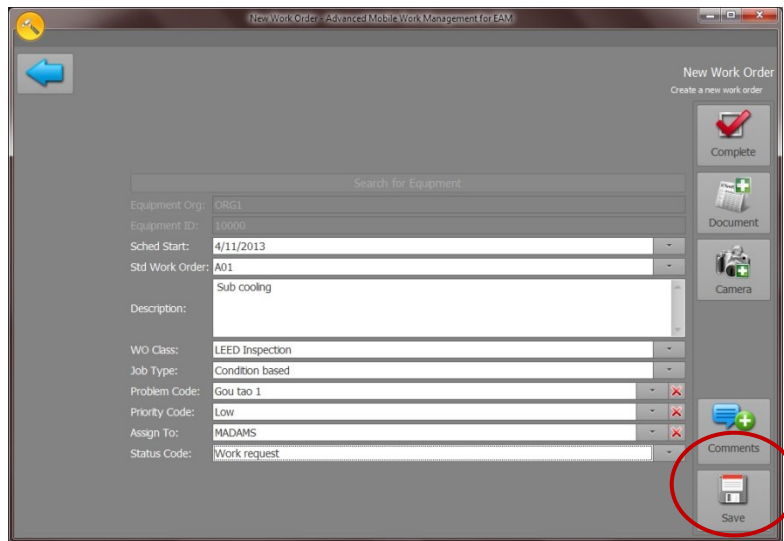
Completion

☞ If you have already completed the work and are creating the ticket for time tracking or other administrative purposes, you can simply select the **Complete** button and you will be taken to the **Work Order Main Screen**



New Work Order Quick Complete

☞ If the ticket is not yet completed, then select the **Save** button and you will be taken to the **Work Order Main Screen**



New Work Order Save

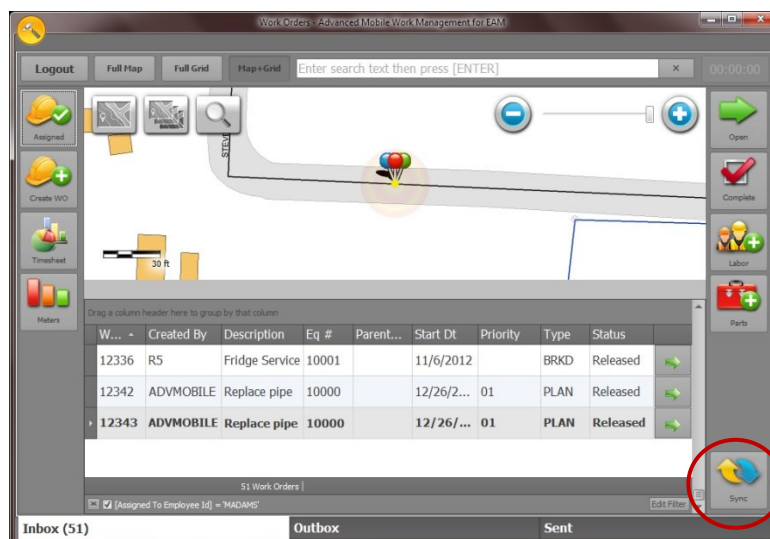
Synchronization / Reinitialization

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
 - The user manually initiates a synchronization process and an active network is available
- ☞ Ensure that the device is connected to an active network

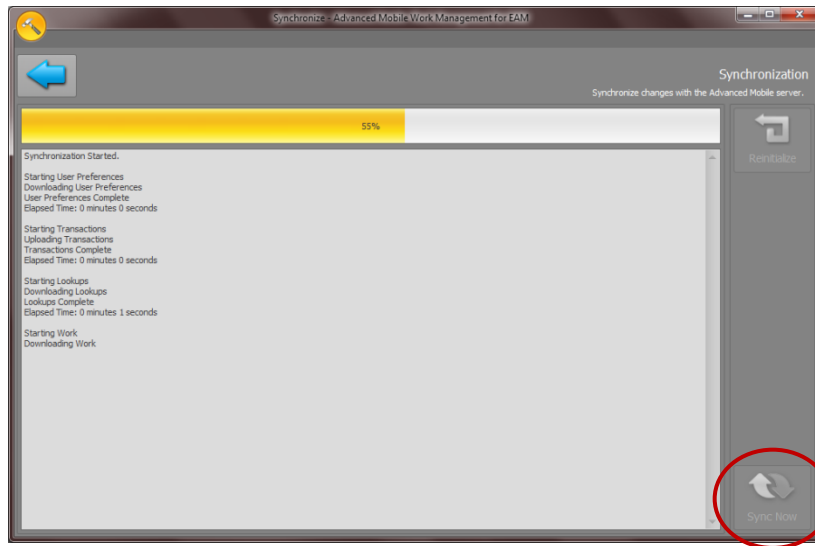
Synchronization

- ☞ Select on the **Sync** button



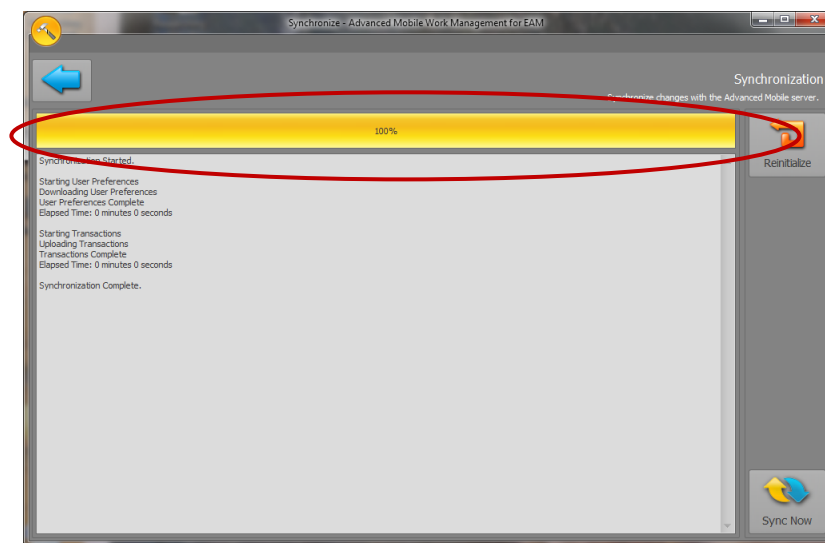
Accessing the Synchronization Function

- ☞ You can manually initiate a new sync by clicking the **Sync Now** button



Synchronization Process

- ☞ The device will automatically contact the **Advanced Mobile EAM Server** and retrieve a current snapshot of the mobile database on a regular schedule
- ☞ You'll know it is complete when the **Progress Bar** is at 100%

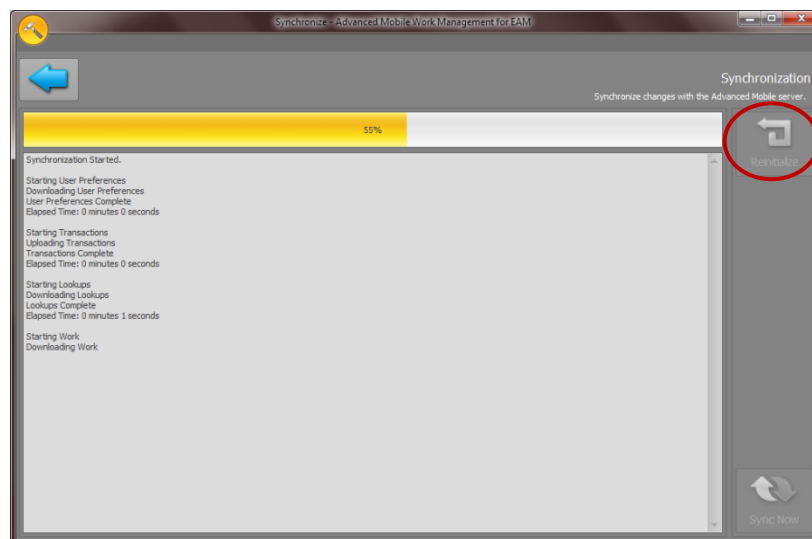


Synchronization Progress Bar

NOTE: The sync process only gets the latest data for your local database

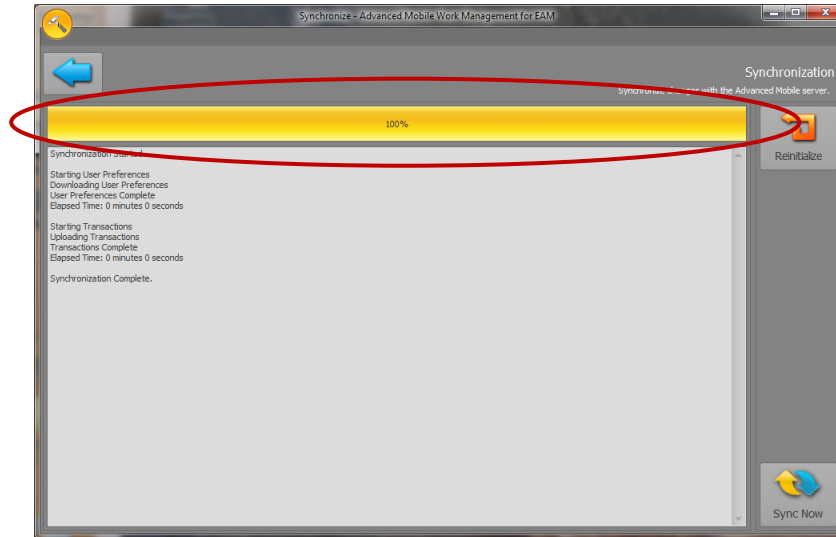
Reinitialization

- ☞ In order to get a complete version of the latest database you will need to select the **Reinitialize** button to download all the latest tables and their contents



Database Reinitialization

- ☞ You'll know it is complete when the **Progress Bar** is at 100%



Reinitialization Progress Bar


RECOMMENDATION

If the Tablet device has been powered off or disconnected from the network for more than 24 hours, it is recommended that you reinitialize 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 or reinitialization process is complete, select the **Back** button ()

Pin Colors, Meaning & Configuration

These settings exist in the EAM Settings Server and can only be altered in that environment.

- ☞ For the Work Order pushpins, there are 3 Work Order attribute options for configuring which color is used for a Work Order:
 - JobTypeCode
 - StatusCode
 - PriorityCode.
- ☞ You can only configure the pushpins for one of these attributes

NOTE: see the Maps4AppsPushpinWork OrderAttribute below.

- ☞ Once you select one of these attribute options, there are 6 pushpin colors to choose from
 - Aqua
 - Blue
 - Green
 - Orange
 - Purple
 - Red.
- ☞ You configure the colors with the Maps4AppsPushpin(Aqua|Blue|etc.)Values (see below)

Maps4AppsPushpinAquaValues	INSP,INSP1	Work Orders with this attribute value (see Maps4AppsPushpinWork OrderAttribute) will be displayed as an Aqua push-pin. (Use comma-separated list).
Maps4AppsPushpinBlueValues	CAL,CAP	Work Orders with this attribute value (see Maps4AppsPushpinWork OrderAttribute) will be displayed as a Blue push-pin. (Use comma-separated list).

Maps4AppsPushpinGreenValues		Work Orders with this attribute value (see Maps4AppsPushpinWork OrderAttribute) will be displayed as a Green push-pin. (Use comma-separated list).
Maps4AppsPushpinOrangeValues	RP	Work Orders with this attribute value (see Maps4AppsPushpinWork OrderAttribute) will be displayed as an Orange push-pin. (Use comma-separated list).
Maps4AppsPushpinPurpleValues	CM,PM	Work Orders with this attribute value (see Maps4AppsPushpinWork OrderAttribute) will be displayed as a Purple push-pin. (Use comma-separated list).
Maps4AppsPushpinRedValues	BRKD	Work Orders with this attribute value (see Maps4AppsPushpinWork OrderAttribute) will be displayed as a Red push-pin. (Use comma-separated list).
Maps4AppsPushpinWork OrderAttribute	JobTypeCode	The attribute on the Work Order that maps to the push-pin color on the map. (JobTypeCode, StatusCode, PriorityCode)

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 **Inbox**

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 memory¹

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 memory¹

Device locks up.

Reset (warm boot) device.

Check device memory¹

¹ 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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