Version 25

Trapeze
Enterprise Asset Management

EAM Mobile

Administrator & User Guide

Trade Secret | February 2026

Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone:	1-877-411-8727
E-mail:	cc@trapezegroup.com
FTP Site:	https://ftps.trapezegroup.com/
Web Site:	https://collaborate.trapezegroup.com

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest Product Compatibility information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

EAM Mobile – Administrator and User Guide

Version 25.x

February 2026

Contents

1. Overview

EAM Mobile is a software application that allows integration of system features with mobile devices. The purpose of the product is to make the applications portable, enabling employees to access and update data related to work orders, asset meter readings, part transactions, etc., from where the work occurs rather than tied to a computer.

This guide is specific to the EAM Mobile application for iOS, Android, or Windows tablets and phones, which will interact with the asset management system. The applications seamlessly operate in a store-and-forward mode where the device queues up transactions when it is offline and automatically processes those transactions to the server when the device comes back online.

Requirements

- Enterprise Asset Management 25.x with Mobile portal configured
- Data Services installed and configured
- Licensing – Mobile Apps, Mapping
- Mobile User Server Configuration
    - Configured as mobile user with PIN
    - Associated employee is active and configured to charge time
    - User group is configured to support access to at least one mobile application
    - Session location is configured
- Mobile Device Management (MDM) – Recommended for enterprise applications. In some cases, it is required for full features including deployment and upgrade management. Regardless of the use of an MDM solution, it is the responsibility of the customer to manage the application including install and upgrades.
- Mobile Device

Android Requirements

Google Play Store

Organizations must register with Google to use managed Google Play. End-users need an account to access managed Google Play on Android. For more information refer to https://support.google.com/googleplay/work/answer/7042221.

Once registered, organizations must provide Trapeze EAM with their Google Organization ID so that EAM Mobile can be made available to them.

The tablet user's Google account must be associated with the organization ID that was delivered to Trapeze EAM.

iOS Requirements

Apple Business Manager

The Apple Business Manager is Apple's central place to automate device deployment, purchase and distribute content, and manage roles. It is expected that your organization is updated to leverage this tool.

iOS Automatic Upgrade Cycle

Mobile for Apple products is released within the App store and must be current with the upgrades available in the App store to be fully supported.

The App store version of the application will be upgraded upon release of each of the core software patch versions. As an example, if you are using an 18.0.4 server version, you will be upgraded to the 18.0.5 iOS tablet application upon release of that version, and you will experience continuing releases for all subsequent versions of the 18.0.x software through the life and support of that version.

- Automatic upgrades will only happen within the major version for bug fixes.
- Automatic upgrades will not happen across major versions.
- All versions are certified with their matching release. Certified versions are included in the testing plan for each EAM Mobile release. A supported, but not certified, version has undergone a limited amount of basic testing.
- It is not supported to mix major versions, such as a 25.x server with a 22.x tablet version. You will be required to install the matching major version to your server.

Automatic upgrades only take place within the App store and are a requirement when using the iOS version of the software. If your organization chooses not to upgrade automatically, it is recommended that you use a Windows 10 tablet deployment structure which can be maintained internally by your IT organization.

Windows Requirements

Windows 10 Build 26100 or newer is required in order to install EAM Mobile. Refer to Microsoft's website for instructions for updating to the latest release.

Enable Sideloading (Windows 10 Devices)

There is only one Windows 10 specific requirement, and that is that you must enable the device for sideloading.

Note: This sideloading procedure only needs to be enabled once for the device. This process does not need to be performed by the user account that will be using EAM Mobile and can be enabled by any device administrator.

How to Enable Sideloading (Windows 10)

1. Open the developer options area. This is available from the following location: **Settings** > **Update & security** > **For developers**.
2. Tap the **Sideload apps** option.

   A confirmation message displays.
3. Tap **Yes** to turn on app sideloading.

Device Compatibility

There are several different devices that will run the EAM Mobile applications. These run on different platforms and will have some small visual differences. Functionality and workflows will be the same unless otherwise noted.

Android Devices

The following are minimum system requirements for Android devices.

Android 12

Screen Size: 7” minimum

Internal Storage: 10 GB +

RAM: 2 GB+

Connectivity: WiFi or Cellular

iOS Devices

The following are minimum system requirements for Apple iPad tablets.

iPadOS & iOS 15

Screen Size: 7.9” minimum

Internal Storage: 32 GB +

Connectivity: WiFi or Cellular

Windows Tablet Devices

The following are minimum system requirements for Windows tablet devices.

Operating system: Windows 10 build 26100 or higher

GPS: Built in or standalone with Bluetooth or USB connection

Screen Size: 7” minimum

Hard Drive: 10 GB+ Free hard drive space

RAM: 2 GB SDRAM+

Connectivity: WiFi or Cellular (recommended)

Pocket PC and Windows CE devices not supported as of 23.x and future versions.

General Information

The information entered in this section applies to areas throughout the portal.

- When entering information in Task ID and Account ID fields, these fields will narrow down according to entered IDs. If a task ID is entered, the **Account ID** field only display accounts that support that task ID. If an account ID is entered, the **Task ID** field only displays tasks that support that account. If neither of these items are entered yet, all accounts or task IDs display.
- For Serial Number choice-lists, only serial numbers supported by the user and their locations, and that also do not have the **Do not consider stock location of serialized parts** option enabled will display.
- To deny users the ability to make updates, you must hide the button from the mobile UI. You must hide the button and not just enable the **Deny Update** for that field. For more information on the UI Admin modes, refer to the *Enterprise Portal Administrator Guide*.

Context Menu

The context menu is a hidden menu opened by a form of interaction with a device. In the procedures in this document, if a context menu is needed, the procedure will state context menu, and not the directions to open, as that will vary on the device you are using.

Mapping

To use any mapping features in EAM Mobile, mapping must be licensed and enabled by your server administrator. 2GB of RAM in the device is a minimum requirement when using mapping. Any feature discussed below will only be available and visible when mapping is licensed.

For more information about mapping, refer to the *Mapping Administrator and User Guide*.

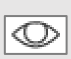
In EAM Mobile, maps use the mapping icons as set up in the Asset portal for different assets, markers, etc.

Creating Custom Filters

Create custom work management filters to use for common searches. Users can only see their own filters on a device. Filters can only be saved to the device, not sent to the server. However, user-created filters on the server will be downloaded when you log in to the device.

When a user creates asset filters with attributes selected in the Work Management portal in Web Modules, those filters do not need to be recreated and will be available as filter options.

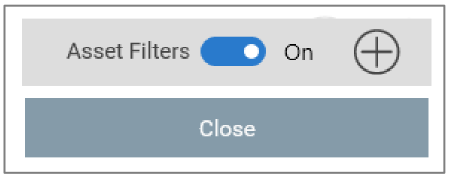
Downloaded filters and device filters display differently. Downloaded filters only display the button to turn on and off the filter, and a view button to view details of the filter. Device filters display with the on/off button, an edit button, and a delete button. Refer to the sections below for more information.

Icon/Button	Description
 or 	Turn on or off the filter. The empty circle is off, while the green check means the filter is turned on. This displays for both server and device filters.
	Edit the filter. This only displays for device filters.
	Delete the filter. This only displays for device filters.
	View the details of the filter. This only displays for server filters.

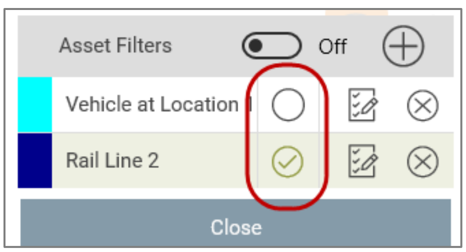
To open the filters list:

1. From the Work Orders, Service Requests, or Assets portals, tap the **Filter** button.

The filters list displays.



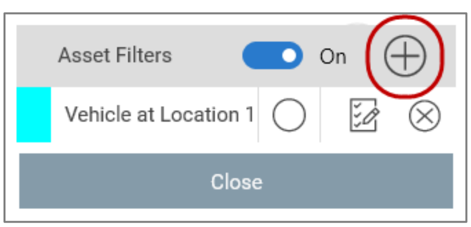
2. Tap the **Filters** toggle to turn on or off all filters. To turn on and off individual filters, tap the individual filter option.



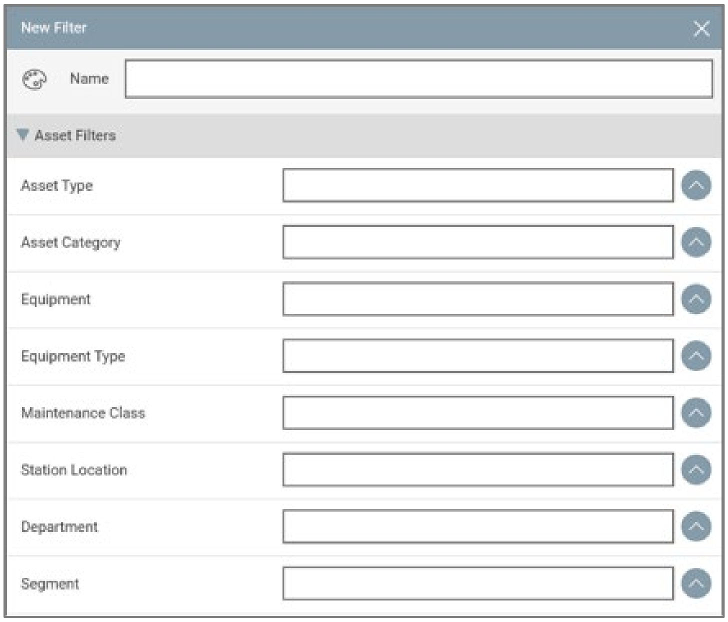
To create a filter:

1. Open the filters list.

2. Tap the **+** button to create a new filter.



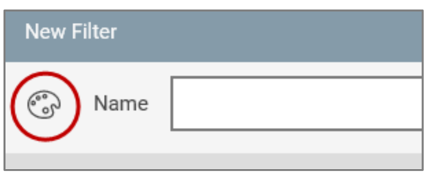
The New Filter pop-in displays.



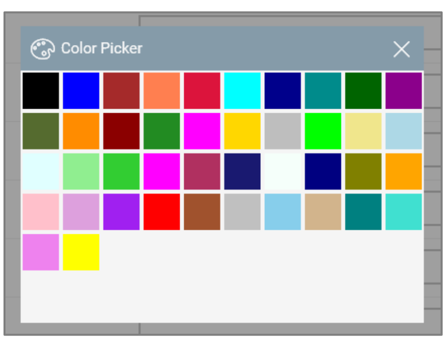
3. Enter a **Name** for the filter.

4. Choose a color for the filter.

   i. Tap the paint pallet icon to choose a color for the filter.

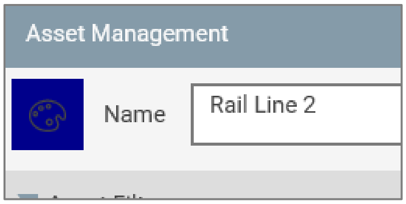
   

   The Color Picker displays.

   ii. Tap a color to select it for the filter.

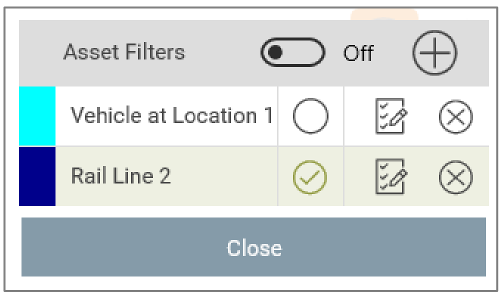
   The color displays on the New Filter pop-in.



5. Enter information manually or use the choice-lists to enter information in the fields available to set up the filter. The fields available vary depending on the portal you used to open the filters. Filter sections available include Asset Filters, Work Order Filters, Service Request Filters, and Additional Filters

6. When you are done entering information, tap **Save**, or, tap **Close** to exit the New Filter pop-in and not save any entered information.

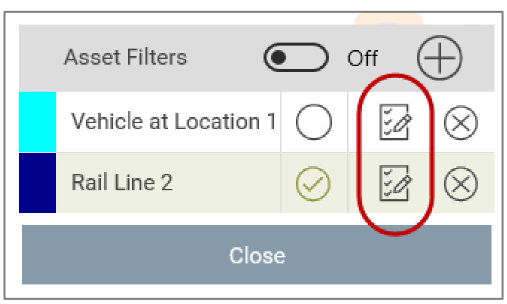
   The new filter displays in the Asset Filters list.



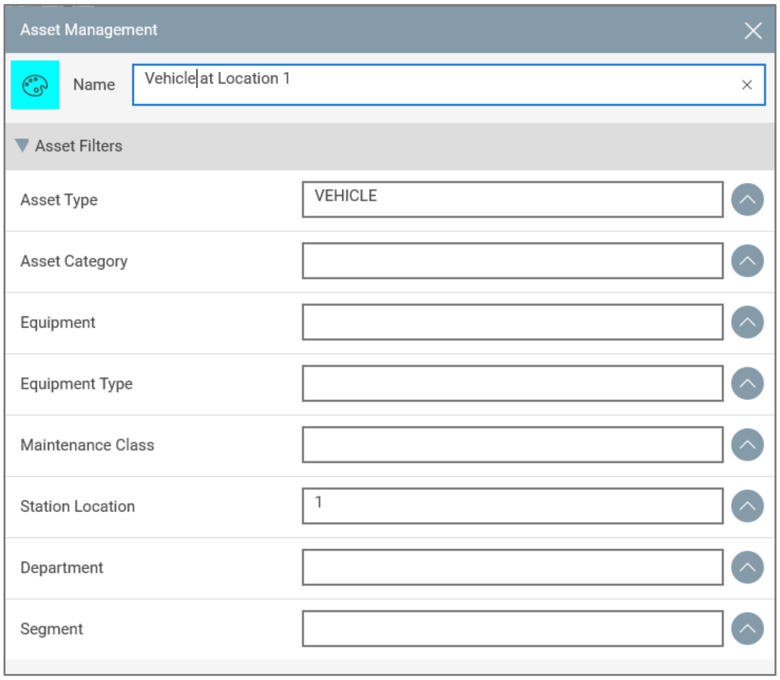
To edit a filter:

1. Open the filters list.

2. Tap the Edit icon to open the filter details.



   The filter details display.



3. Edit details as necessary.

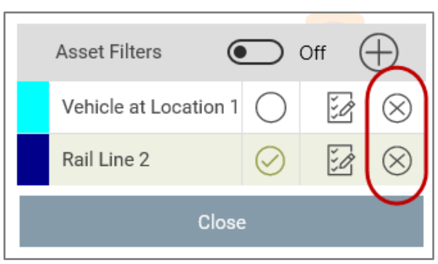
4. Tap **Save** when you are done editing, or tap **Close** to exit without saving changes.

   The filter is saved.

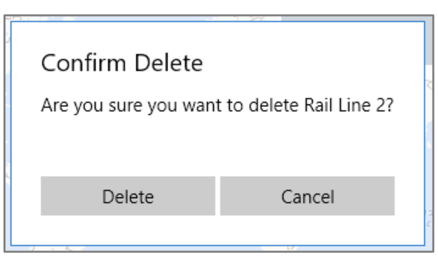
To delete a filter:

1. Open the filters list.

2. Tap the **X** button.



A confirmation displays.



3. Tap **Delete** to delete the filter or **Cancel** to leave the filter as is.

   The filter is deleted.

2. Installing or Removing EAM Mobile

The following sections have device specific installation instructions. Refer to the appropriate sections for the steps to install the application on your device.

Install and Update EAM Mobile

Android

Android Enterprise is required to access the EAM Mobile application through the Google Play store.

Installing or Updating EAM Mobile (Android)

After the prerequisites are completed, you may begin the install by searching it on the Google Play Store.

If you need to re-initialize the app to update licenses, go to Connection Settings > Test Connection and tap **Initialize App**.

iOS

The Apple Business Manager (ABM) is required to access the EAM Mobile application through the Apple App store.

Installing or Updating EAM Mobile (iOS)

If ABM registration is active, the EAM Mobile app will be installed and ready for use on your iOS device. Review the iOS Requirements above for additional information about the Apple Business Manager.

Windows

Windows uses sideloading for installing this application. The following sections include instructions for installing the application for a single user or multiple users.

Installing EAM Mobile (Windows 10)

Single User:

After the prerequisites are completed as noted above, you may begin the install by running the EAM Mobile installation file, which installs EAM Mobile on the device.

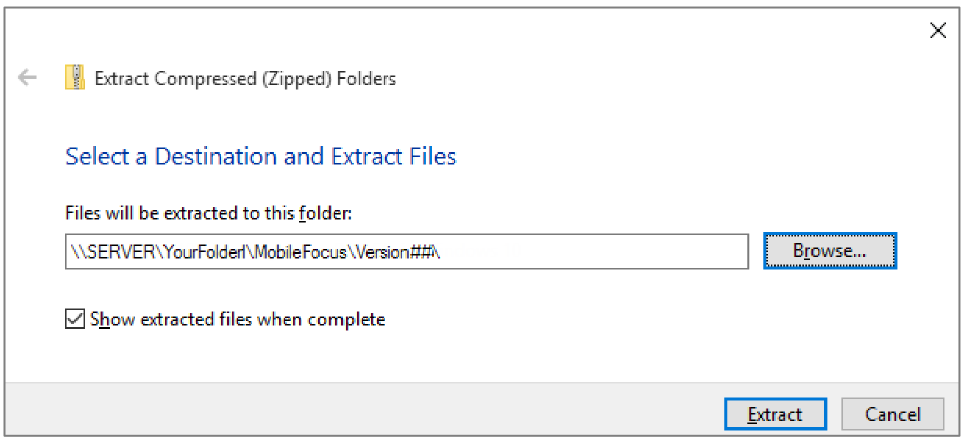
Extract the files:

1. From the downloaded folder, tap the download file to launch the extraction process.

   A confirmation message displays to confirm you want to allow this program to make changes to your computer.

2. Tap **Yes**.

3. Choose where to install the files and tap **Extract**.



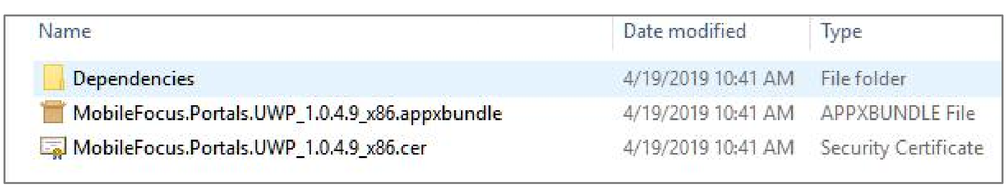
   The files are extracted to the device.

Mobile Dependencies

Before the initial installation of EAM Mobile, you must install the dependencies for the software. These dependencies must be installed with the first installation of the EAM Mobile application and do not need to be reinstalled with updates.

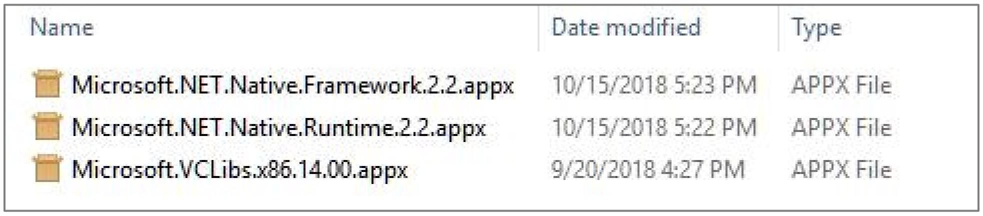
To install the dependencies:

1. From the EAM Mobile package folder, open the **Dependencies** folder.

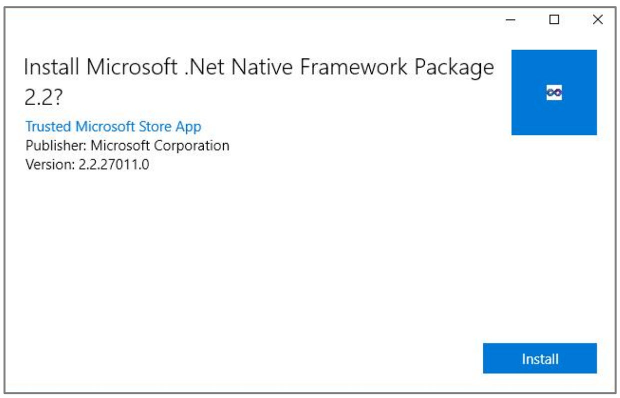


2. Open the **x86** folder.

The Microsoft files display. All of the dependency files must be downloaded.

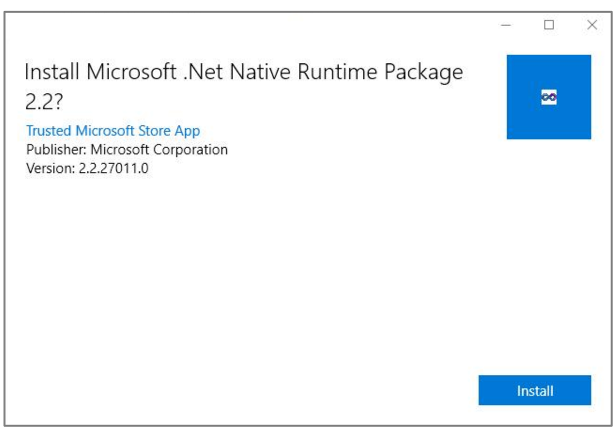


3. Tap and hold the **Microsoft.NET.Native.Framework.2.2** file, and tap **Install**.



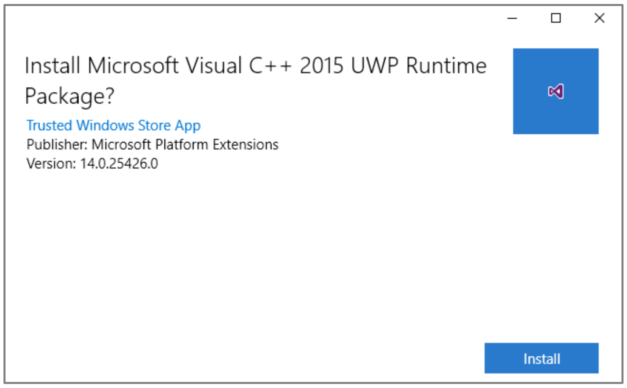
4. When the install is complete, tap the **X** to close the window.

5. Tap and hold the **Microsoft.Net.Native.Runtime.2.2** file, and tap **Install**.



6. When the install is complete, tap the **X** to close the window.

7. Tap and hold the **Microsoft.VCLibs** file and tap **Install**.



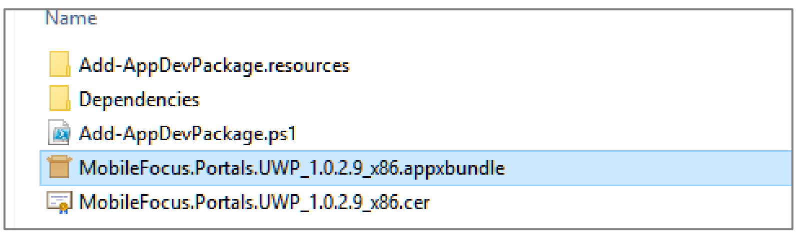
8. When the install is complete, tap the **X** to close the window.

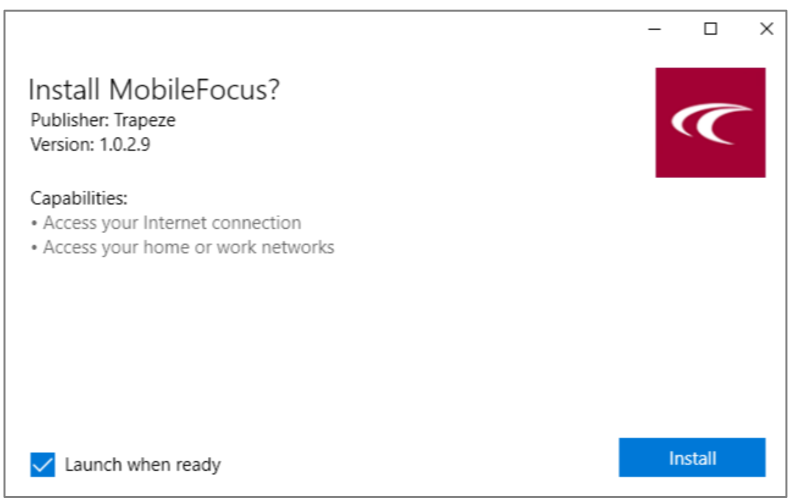
   The dependencies are installed.

To install the application:

1. In the EAM Mobile application folder, tap and hold the EAM Mobile .*.appxbundle file, and tap **Install**.

   The * will be the version number of the EAM Mobile package, as shown below.





2. Wait for the installation to complete. A progress indicator will display the progress.

3. When the install is complete, tap the **X** to close the window or **Launch** to open EAM Mobile.

EAM Mobile is now installed.

Multiple Users:

1. Install EAM Mobile on your machine.
2. Create a shortcut.
3. Copy the shortcut to C:\Users\Public\Desktop. This puts the EAM Mobile shortcut on a desktop for any user who logs in to your machine.
4. Login as a different user and click on the shortcut.
5. EAM Mobile automatically installs and opens for that user.

Updating EAM Mobile (Windows 10)

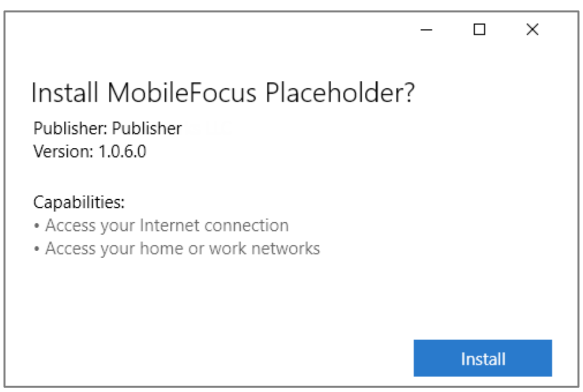
When you have already installed EAM Mobile and need to update your application, use the following procedure.

Run the Update File

To update EAM Mobile:

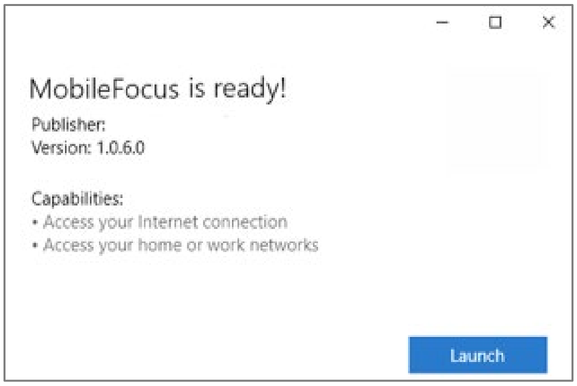
1. Find the EAM Mobile.*.appxbundle file in the download folder. Tap and hold the file and tap **Install**.

   The installer pop-in displays.

2. Tap **Install**.

   EAM Mobile installs. Once the install is complete, a completed message displays.



3. Tap **Launch** to open EAM Mobile.

Launch EAM Mobile

To launch the EAM Mobile application after the initial install, open the **Start** menu (Windows logo) and search for EAM Mobile, or browse for it under all applications and tap the application.

Remove EAM Mobile

Steps to uninstall applications vary slightly depending on the device you are using. If you need to remove an application, refer to the appropriate sections below. With the removal of applications, all downloaded information for the application is removed as well.

Android

To uninstall an application:

1. Go to Settings > Applications > Manage Applications.
2. Locate EAM Mobile in the list and tap it.
3. Tap **Uninstall.**
4. Confirm that you would like to uninstall the application when confirmation message appears.

   EAM Mobile is uninstalled from the device.

iOS

To uninstall an application:

1. Locate the EAM Mobile icon. Tap and hold the icon until it starts to wiggle.
2. Tap the X that will appear in the upper left corner of the icon.

3. Tap **Delete** in the dialog that displays.

You can alternatively do the following:

4. Go to Settings > General > Storage or Applications.

   A list of your apps will appear.

5. Locate the EAM Mobile app in the list and tap on the name.

6. Tap **Delete App**.

   EAM Mobile is uninstalled from the device.

Windows 10 Devices

To uninstall an application:

1. Tap the Windows start menu icon.

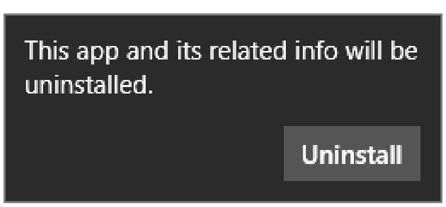
2. Locate the application in the list of applications on the device.

3. Tap and hold the name of the application.

   The options menu displays.

4. Tap Uninstall.

   A confirmation message displays.



5. Tap **Uninstall** to remove the application. You can also tap anywhere else to close the confirmation and leave the application installed.

The application is uninstalled.

3. Configuring EAM Mobile

Server Settings Configuration

EAM Mobile also supports automatic configuration of server settings by using a file that is placed into the application folder during installation. The application must be installed using the following command:

Add-AppxProvisionedPackage -Online -PackagePath "APPXBUNDLE_PATH" -CustomDataPath "CONFIG_FILE_PATH.xml" -SkipLicense

- Config file format: *.xml
- Config file sample:

<ServerConfig>

<Protocol>http</Protocol>

<ServerAddress>localhost</ServerAddress>

<ServicesPort>9000</ServicesPort>

<ServerCertificatePublicKey/>

</ServerConfig>

URL and QR Code Generation

A URL can be created to launch EAM Mobile like so: EAM Mobile://ServerSetup/https/eam.trapezegroup.com/9000

This link can then be turned into a QR code using standard tools such as the tools found here: https://www.qr-code-generator.com/

EAM Mobile also currently supports configuration via a special URL syntax. This URL can be put into a QR code generator for others to use to easily configure their tablet with the same connection configuration.

For v22+ EAM Mobile the basic format is:

```
EAM Mobile://ServerSetup/<Protocol>/<Server Address>/<Services Port>/[SSL Certificate Public Key]
```

Pre-v22 EAM Mobile the format looks like this:

```
EAM Mobile://ServerSetup/<Protocol>/<Server Address>/<Services
Port>/<Identity Port>/[SSL Certificate Public Key]
```

- Protocol (Required) - Needs to match the value of the Protocol dropdown on the Data Services tab of the Data Services configurator

  Accepted Values: http, https

- Server Address (Required) - Needs to match the value of the Host field on the Data Services tab of the Data Services configurator
- Services Port (Required) - Needs to match the value of the Port number field for Service API on the Data Services tab of the Data Services configurator
- Identity Port (Required) - Required pre-22.0, otherwise not present - Needs to match the value of the Port number field for Identity Server on the Data Services tab of the Data Services configurator
- SSL Certificate Public Key (Optional) - Needs to match the Public key value for the certificate selected in the Data Service configurator. The public key value itself is found in Windows' Certificate Manager.Prevents man in the middle attacks using certificate pinning. In other words, this requires a matching certificate the client knows.

4. Setup and Login

Setting up Access Rights

In several portals throughout EAM Mobile, create (+) and edit (edit pencil) icons display for users that have access rights to those functions. The specific screen rights are described in the following sections. If a user has no rights to view, insert, or update for the necessary screens, the create and edit buttons are hidden in EAM Mobile.

Access rights are set up on the Enterprise Portal Screen Rights Template screen. Refer to the Screen Rights Template help page for more information.

Asset Management

In the Asset Management portal, buttons to create and edit are available to users that have rights to these functions on the Asset Primary screen. If users do not have Asset Primary access, then the system follows a hierarchy looking for screen rights through the Fleet Equipment, Rail Equipment, and Linear Assets - Primary Information screens.

- Create (+) displays if the Insert right is allowed for the user.
- The Edit pencil displays if the Update right is allowed for the user.

Service Request

In the Service Request portal, buttons to create and edit are available to users that have these functions on the Service Requests/Defects screen. These rights also apply to the create button in the bottom toolbar for the Work Order Details, Asset Details, and Service Request Details pages.

- Create (+) displays if the Insert right is allowed for the user.
- The Edit pencil displays if the Update right is allowed for the user.
- If user supports all locations, pending service requests at any location can be viewed.

Work Orders

In the Work Orders portal, buttons to create and edit are available to users that have these functions on the Work Order Center and Multi-unit Work Order screens (when working with multi-asset work orders). These rights also apply to the create button in the bottom toolbar for the Work Order Details, Asset Details, and Service Request Details pages.

- Create (+) displays if the Insert right is allowed for the user.

- The Edit pencil displays if the Update right is allowed for the user. This option only applies to non-multi-asset work orders.

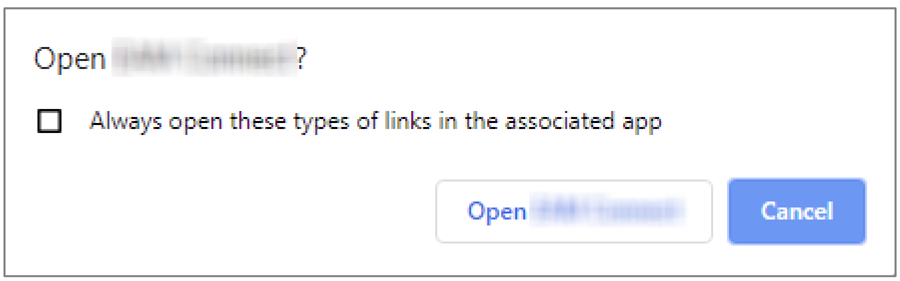
Setting up the Server

Enter server information to point the application to the organization server. Server settings can be set up by scanning a QR code or set manually.

Using a QR code to set up EAM Mobile server:

1. Open your device's camera.
2. Scan the QR code.

   A confirmation message displays asking if you want to open the application. This message may vary per device and browser.



3. Tap the **Open [application name]** button.

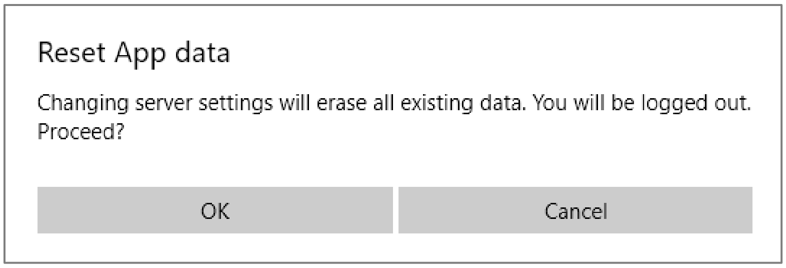
   The device opens the application and the server settings.

Connecting a new server or the same server

- If no server is currently set up, the application sets up the server settings from the QR code.
- If the server is the same server as already set up, no changes will take place.

Connecting to a different server

- If an application is already set up and the server settings do not match (for example, the device is connecting to different server), the system displays a warning that the device will delete all data associated with the current server and connect to the new server. This is to avoid having data overlap and issues between servers.



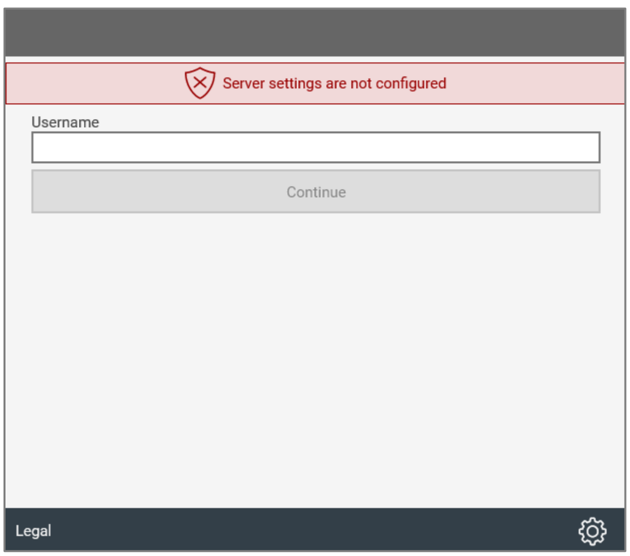
- Tap **OK** to continue.

  If the user is currently logged on, the user is logged off and all data is deleted. The application then sets up the new server information.

Manually setting up a EAM Mobile server:

1. Launch the application.

   The EAM Mobile application opens and you will be notified if the server settings have not been configured.



2. Tap the gear icon.

The Server Settings page displays.

3. Enter the server information in the **Server Address** (server ID address or server name) and **Services Port** fields. This information is available from your system administrator.

4. Enable SSL if single sign-on is available and used by your organization.

Note: SSL is strongly recommended. This requires server-side changes. Without SSL, all communications done from the device are not secured and lack encryption (this includes items such as passwords sent to the server on login).

SSL pinning can be enabled to strengthen security. SSL pinning is configured by setting "Server Certificate Public Key" on the Server Settings page to the server's SSL certificate public key. Configuring this option ensures that only traffic from a server that uses a trusted certificate is accepted. Any traffic to or from an untrusted server will be blocked. This can adversely affect file downloads from external file systems. To get the server certificate public key, do the following:

i. Open the Configurator and determine which certificate is being used.

ii. Open certmgr.exe on the server.

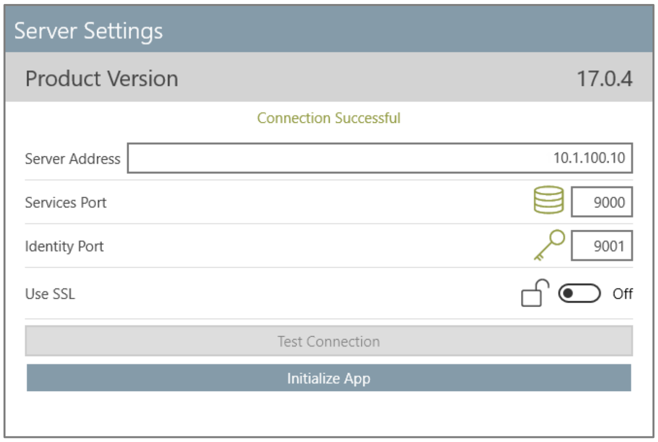
iii. Find the certificate that is being used and open it.

iv. Go to the Details tab and select the **Public Key** field.

v. Copy the **Public Key** data

5. Tap **Test Connection** to test to make sure you can connect to the data entered.

*If the test succeeds, a confirmation message of Connection Successful displays, the **Test Connection** button is greyed out, and the **Initialize App** button becomes usable.*



6. Tap **Initialize App** to download initial data to the device. This is the same information that is automatically downloaded whenever the user signs in with their password.

7. Tap **Back** to return to the Login page.

Using MDM to push custom configurations (Android):

Android supports pushing custom JSON configuration to applications so that they can read and process data on startup. This is useful for preconfiguring apps with admin-provided settings when pushing through MDM. The following JSON format needs to be used when pushing settings:

```
"Protocol":        "https",
"ServerAddress":       "test_server",
"ServicesPort":          "9000",
"IdentityPort":       "9001",
"ServerCertificatePublicKey" : "123wefdsdfdsf"
```

Viewing Legal Information

Legal information is available to view from the login page.

To view legal information:

1. On the bottom-left corner of the login page, tap **Legal**.

The License Agreements pages display.

2. Swipe the screen to the left to see individual license pages.

Logging In

When you open the application, you will have to log in before continuing into the application.

Note: When a user logs into EAM Mobile, the application uses the user’s session location for data, work orders, etc. For this to work correctly, every user must have a session location set for their mobile user. This setting, called **Session location ID**, is found in the Enterprise Portal on the Users screen, Basic Info tab.

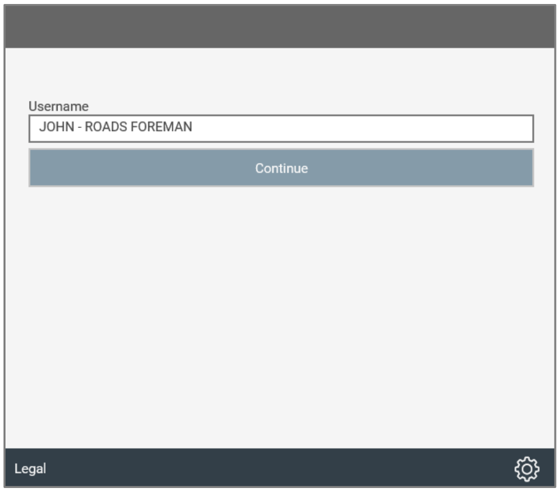
Note: For a user to log in, the **Charges time** checkbox on the Employees – Primary Information screen Scheduling tab must be checked for the user’s associated employee.

Note: Users can be required to change their PIN upon next login. To enable this functionality, administrators must check the "User must change PIN on next mobile device login" setting on the Users screen in Enterprise Portal.

To log in:

1. Open the application.

The login page displays.



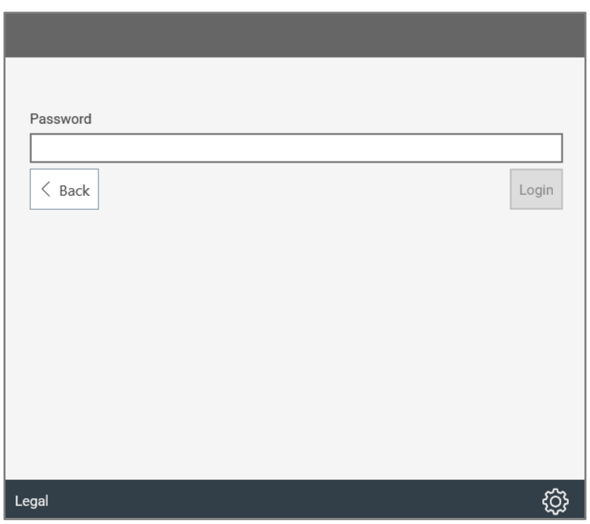
2. Enter your ID in the **Username** field.

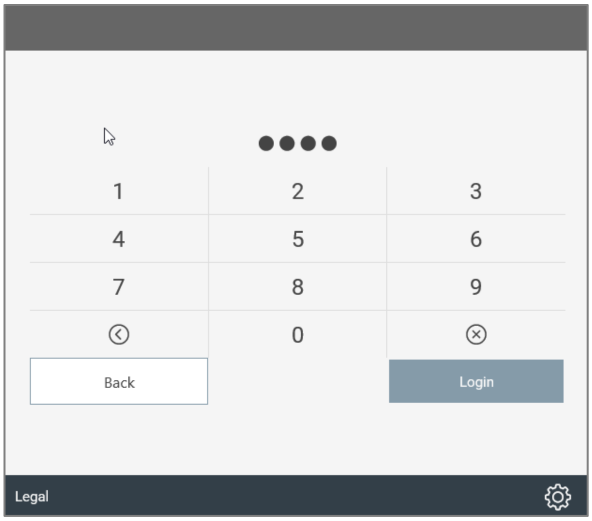
3. Tap **Continue**.

   The password page or pin page displays.

   Note: After signing in the first time, the application creates a token for the user. From then on, the user only needs their user ID and a pin to log in until the token expires and they need to enter their password again to create a new token. Pin numbers are set up on the Users screen in the Enterprise Portal.

   Tip: When using Windows 10 in tablet mode, or a tablet running Windows 10, the keyboard for the Password field will have the first character be in uppercase mode. Therefore, if you have a password with a lowercased first letter, be sure to shift the touch keyboard so the letters toggle from uppercase to lowercase.





4. Enter your password or your pin.

   Note: SSO methods will be used for verification if enabled through Data Services via the Configurator. Please see the *Administrator Guide Section 10. Configure Single Sign-On (SSO)* for more information.

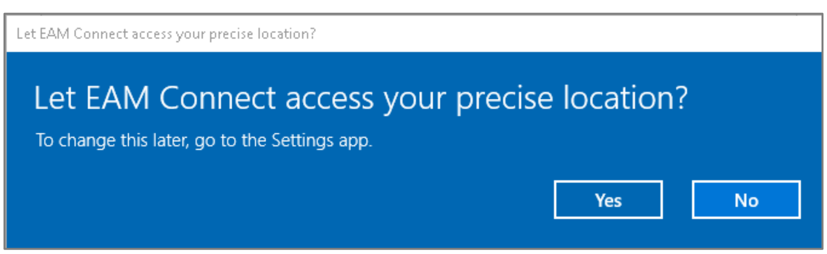
5. Tap **Login**.

6. The Dashboard page displays.

Initial Login

Upon initial login, base information and assignment will begin the download process. You will see a Purple banner notifying you that the initial data download has begun.

Once you click into a portal, you will be prompted to let the mobile application access your precise location:



If you click **No**, you will not be able to see your location in a map view.

The rights access will need to be enabled for the following features:

- **Allow EAM Mobile to access your location?** This will allow GPS location to be stored for Work tracking

- **Allow EAM Mobile to access your camera?** This will allow the camera to be utilized by the app to take photos

If you choose **Don’t allow** the described features of the application will not be accessible.

Logging Out

Users are automatically logged out based on the “Auto-logout timer” setting which can be found on the Admin > Options screen in Enterprise Portal. This value determines the length of time before the system logs out after no activity. Timeout is turned off if this setting is empty. If set to zero, the system will logout immediately after going to the background.

5. Downloading Data

Data Download Scenarios

Data downloaded on initial login

During initial login with password all data and codes will be downloaded automatically for all supported portals. Users do not need to re-download any data manually. The only optional download that potentially needs to be triggered by users is download of Assets that were not automatically downloaded (by default only assets user work on are downloaded).

Data downloaded on subsequent password logins

After initial download, any subsequent login with password will result in download of user specific data points:

- Service Requests
- Work Orders
- Test Results
- Put Away cards
- Pick Lists
- Inventory Counts
- User Info
- Crew Info
- Jobbed on Statuses
- Timesheets

⚠ Codes that do not change very often, like Repair Reasons, WACs, Locations, etc. will only be downloaded during the first login with password or if triggered manually by the user on the Data Download page.

Data downloaded during PIN logins

Data is NOT automatically downloaded after users login with PIN. Any required data needs to be downloaded manually on the Download Data page. Users will still see data downloaded previously and background/automatic synchronization will still occur every 5 minutes.

Automatic Background sync

When online, EAM Mobile checks for certain data points every 5 minutes and synchronizes automatically in the background without user interaction and/or downloading data through the queue.

EAM Mobile synchronizes data for the following:

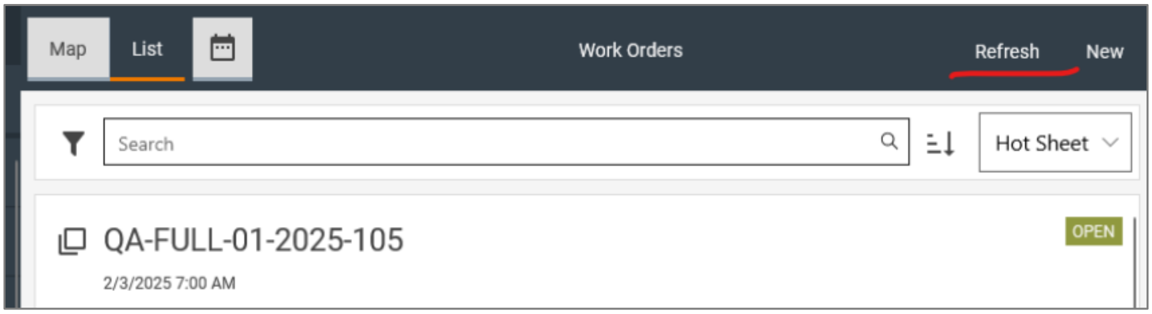
- Jobbed-on Status
- Existing Assets
- Service Requests
- Work Orders
- Work Assignments
- Put-aways cards
- Inventory Counts

In addition to background synchronization, EAM Mobile performs the following syncs on navigation to a specific object:

- Sync of Work Order data and jobbed-on status on navigation to a specific Work Order.
- Any renumbered asset will be automatically refreshed with new asset ID and relevant data on navigation.

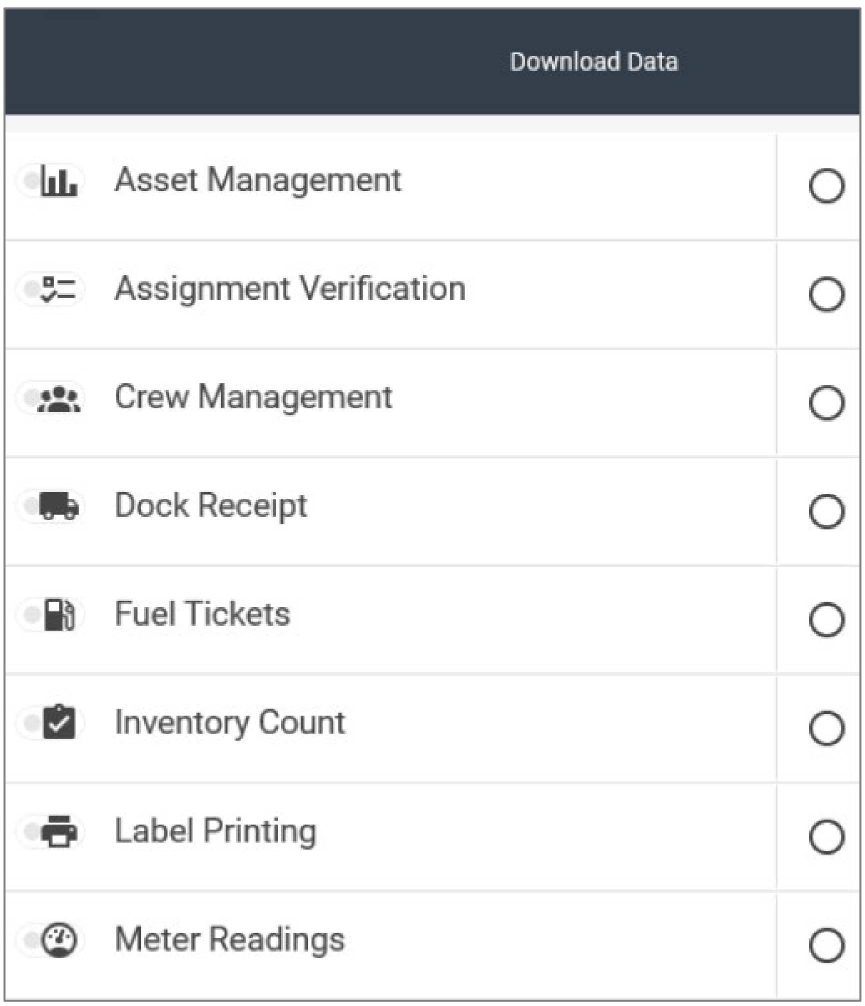
Refreshing data for a specific portal and/or object

All portal list and detail pages have a “Refresh” button that can be used to download data for relevant portal/object. For example, clicking refresh on the Work Order list page will result in the download of all assigned work orders and related data (tasks, files, test results, etc). Clicking “Refresh” at the work order details level will result in the download of data for the individual work order.



Data Download Page

The Download Data page can be used to manually download ALL data for selected portals. This includes all static codes (Repair Reasons, WACs, Purchase Order Types, etc.). Normally, this is only necessary when users are notified about changed codes and/or they do not see necessary codes in choice lists. To see what is being downloaded for each portal visit individual portal pages.



When downloading data from this page, data is downloaded based on the session location, shop location, and employee supported locations. If there is no location assigned to the login ID, no shop location, and no employee supported locations specified for the user, this will download all available data in the system for each option and can be very time-consuming and data intensive. It is highly recommended to have a location set up for each user in the system.

A Download for all Locations option displays if the employee is set to support all locations.

Only subsystem properties that have the checkbox “Supported in mobile” checked will be downloaded to the mobile device. This setting can be found in Enterprise Portal on the Setup, Equipment Units, Equipment Subsystems screen, Subsystem tab, Associated Properties table.

Recommended workflow for users to limit unnecessary downloads

- User logs in for the first time
    - No manual download necessary. Only download additional assets into asset management portal if necessary.
- Subsequent logins
    - No download is necessary from Data Download page unless static code changes are suspected and/or missing codes. If codes did change and/or are missing, go to Download Data page and select portals for which you would like to download data.
    - It is generally a good idea to “Refresh” data on list pages after navigating to a portal to get latest work assignments.

Downloaded Data by App

The following table lists what will be downloaded with each app. The options may vary slightly from your specific environment.

App	Data Downloaded	
Work Orders	TaskAssignmentEmployees	TaskLocations
	WorkAccomplishedCodes	ConditionRatings
	WorkAccomplishedCodeCategories	LifeCycleStatuses
	WorkOrderAttributesMain	Positions
	RepairReasons	AssetTypes
	Crews	ClassTasks
	CrewEmployees	ClassTaskPmTasks
	OperatorEmployees	ClassTaskTests
	RepairSites	ClassIndividualPmPrograms
	Priorities	ClassPmServices
	PriorityAssetCategories	ClassPmServiceDetails
	AssetCategories	Vendors (Active)
	WorkDelayCodes	ServiceStatuses
	Segments	Accounts (Active)
	Markers	AccountTasks
	Shapes	PartIssues (At supported locations)
	ShapePoints	Locations (For supported locations)
	WorkClasses	PartsLocation (At supported locations)
	Tasks	UserFilters (For current user)
	TaskAssetCategories	Operators (Active)
	TaskWorkAccomplishedCodes	EmployeeClassifications (Supported by employee)
Meter Readings	LatestEquipmentMeterReadings (Meter 1)	LatestEquipmentMeterReadings (Meter 2)

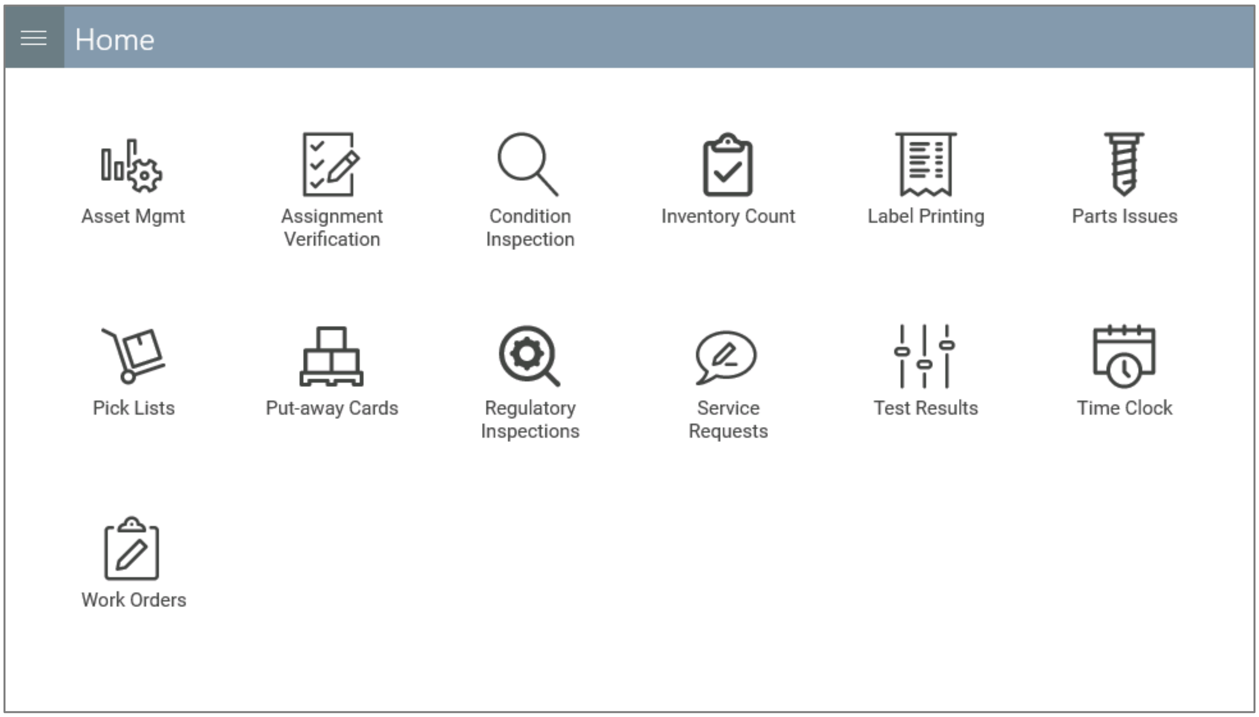
App	Data Downloaded	
Asset Management	Accounts (Active)	EquipmentManufacturers
	AccountTasks	EquipmentRentalRates
	Addresses	EquipmentSubsystems
	AssetCategories	EquipmentTypes
	AssetTemplates	EquipmentTypesAttributes
	AssetTypeProfileAssetTypes	EquipmentTypesAttributesMain
	AssetTypeProfileAttributes	LifeCycleStatuses
	AssetTypeProfiles	Locations (For supported locations)
	AssetTypes	MapSymbols
	ChoiceLists	Markers
	Colors	Segments
	ConditionRatingAssetCategories	ShapePoints
	DepartmentAttributeMain	Shapes
	Departments	Subsystems
	EquipmentClasses	Symbols
	EquipmentComponents	UserFilters (For current user)
	EquipmentManufacturerModels	
Test Results	TestResults (At supported locations)	TestTypeEquipmentClasses
	TestTypes	TestTypeEquipmentTypes
	ConditionRatings	TestTypeLines
	ConditionRatingAssetCategories	ClassTaskPmTasks
	TestElements	ClassTasks
	TestTypeEquipments	ChoiceLists
Service Requests	Segments	Tasks
	Markers	TaskAssetCategories
	Shapes	TaskLocations
	ShapePoints	ConditionRatings
	Symptoms	Positions
	SymptomAssetCategories	AssetTypes
	SymptomTasks	Accounts (Active)
	Priorities	ServiceRequests (Pending and at supported locations)
	PriorityAssetCategories	TaskAssignmentEmployees
	WorkClasses	WorkPositions
	RepairReasons	

App	Data Downloaded	
Put-away Cards	Locations (For supported locations) Bins (At supported locations) PartLocationBins (At supported locations)	PartsLocation (At supported locations) PutAwayCards (At supported locations and not approved)
Pick Lists	Locations (For supported locations) Priorities Bins (At supported locations) PartLocationBins (At supported locations)	PartsLocation (At supported locations) PutAwayCards (At supported locations and not approved)
Time Card	Labor (For current employee), Employees (Current employee), WorkAccomplishedCodes TimeCodes	EmployeeClassifications (For current employee) Tasks TaskAssetCategories
Assignment Verification	AssetInventoryManagementsForEmployee (For current employee)	
Crew Management	Employees (Active) Labor (For employee crews) Crews CrewEmployees Operators (Active)	OperatorEmployees TimeCodes Accounts (Active) AccountTasks Tasks
Part Issues / Requests	TaskAssignmentEmployees PartIssues (At supported locations) Locations (For supported locations) PartsLocation (At supported locations) Tasks TaskAssetCategories WorkAccomplishedCodes	Positions FailCauseCodes FailCauseAssetCategories FailCauseManufacturers FailCauseSymptoms PartClassifications
Label Printing	Locations (For supported locations) Bins (At supported locations)	PartsLocation (At supported locations)
Inventory Counts	Locations (For supported locations) UnitsOfMeasure	InventoryCount (Status of PENDING, IN PROGRESS, or DOWNLOADED and assigned to current employee)
Dock Receipts	DockReceipts (Not completed and assigned to employee) EnterprisePurchaseOrders (At supported locations)	StockTransfers (Supports UseOnPurchaseOrders) EnterprisePurchasingStatuses (At supported locations)

6. General Information

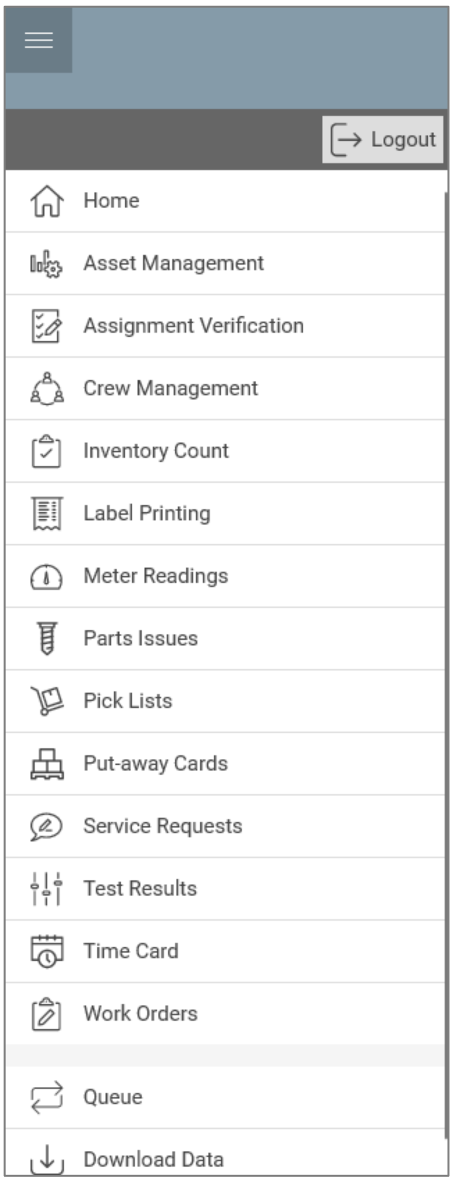
Home Screen

Home is the main screen of the application. This is the screen that displays after logging in. You can return to this screen by tapping the **Home** icon from the main menu from anywhere in the application. The Dashboard displays the portals available to you.



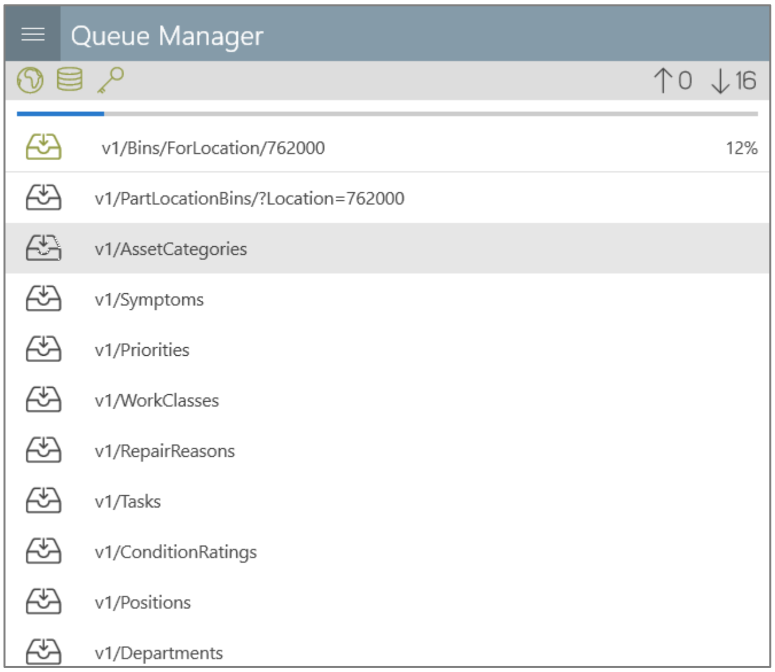
Menu

The main menu allows you to move around between portals and settings pages in the application. You can open this menu from anywhere in the application by tapping the button in the top-left corner of the application. Below the list of portals are the administrative functions including Queue, Download Data, Profile and Admin. For more information, review the sections below.



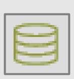
Queue

Tap **Queue** to see the information waiting to be uploaded or downloaded. The Queue Manager page also displays information about your connection to the network with icons in the top-left corner.



Connection Icons

These icons display the status of your device connections. When the icons are green, they are connected. Otherwise, these icons are grey.

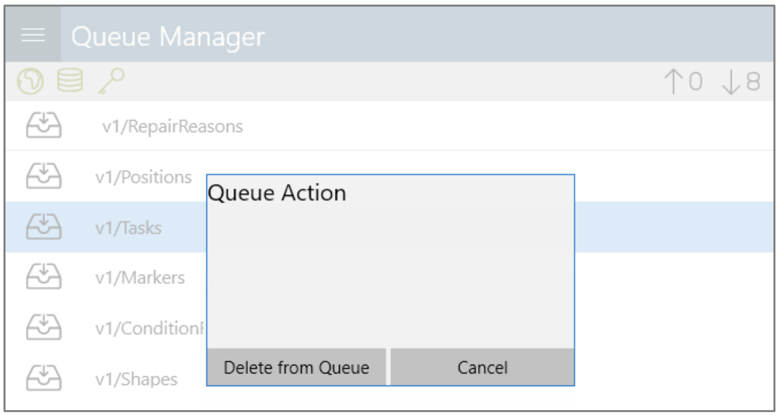
Icon	Description
	Network connection status.
	Data services connection status. This is the server.

Deleting Queue Items

If you need to delete an item from the queue list for any reason, use the following procedure.

To delete a queue item:

1. Tap any item in the queue.
2. The Queue Action pop-in displays.



3. Tap **Delete from Queue** to delete the item, or **Cancel** to leave the item in the queue.

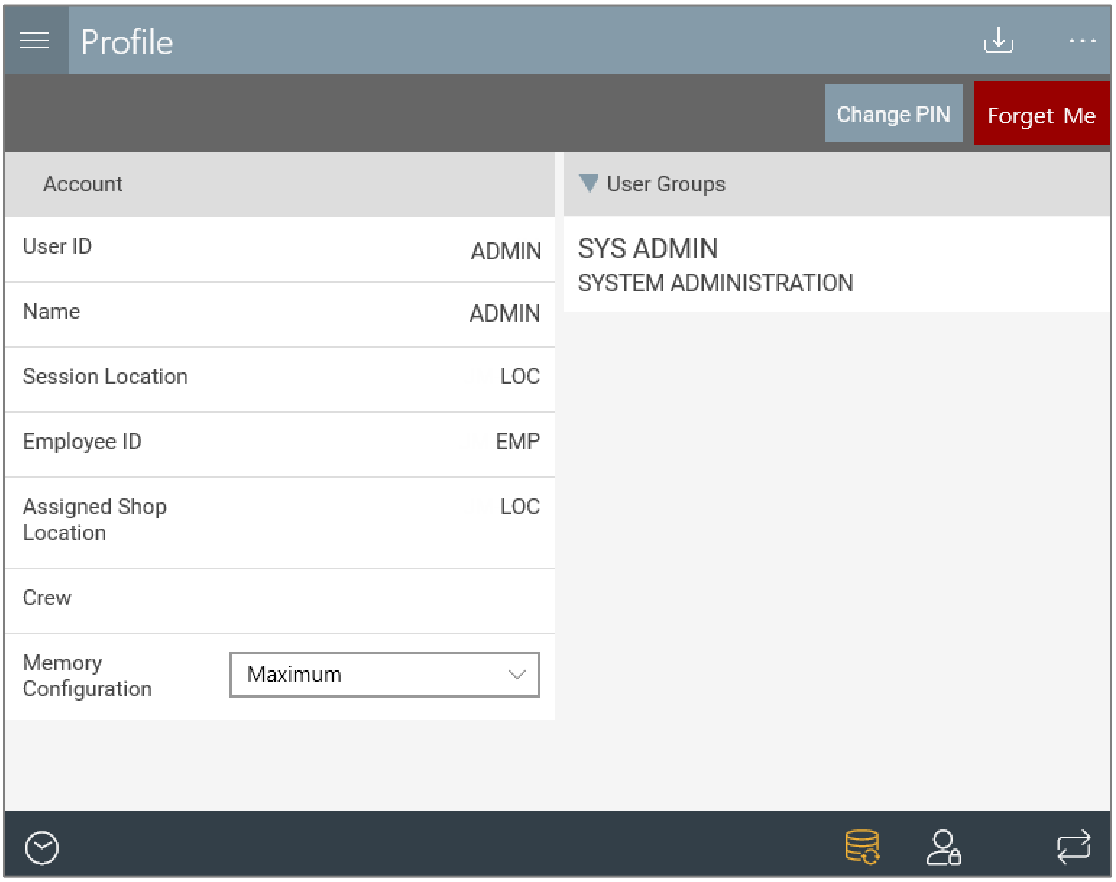
Queue Errors

If for some reason a queue item encounters an error, you have the following options when you tap the errored item.

- **Edit Transaction:** This option opens the page designed to handle that specific item. If an item is not supported on the device and requires use of the Web Modules, a message displays to alert the user to this need.
- **Try Again:** Tap this to resend the same request to the server to be reprocessed. This is a good option if the error seems related to connectivity issues with the server or internet.
- **Defer to Server:** Send the item to the server to be handled by someone else. This will remove the item from the queue. Note that this may cause the next items to fail if they relied on the deferred item to be accomplished.

Profile

Tap **Profile** to open the profile information for the current logged in user. Information available includes User ID, Name, Session Location, Employee ID, Assigned Shop Location, Crew, Memory Configuration, and the user groups to which that user belongs.



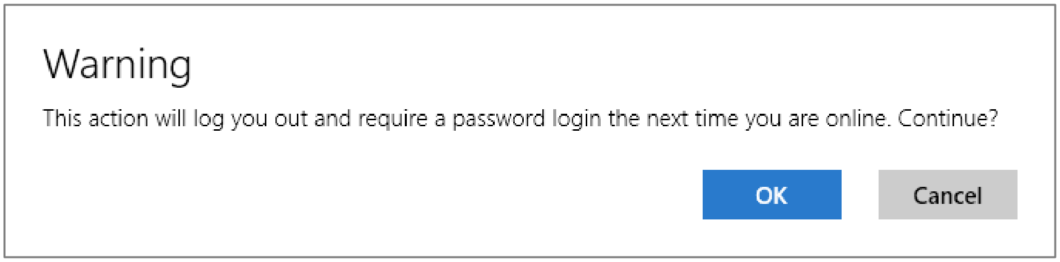
To change PIN:

1. Tap **Change PIN**.
2. Enter values into the following fields:
    i. Old PIN
    ii. New PIN
    iii. Confirm New PIN
3. Tap **OK** to change the PIN.

To forget a user:

1. Tap **Forget Me**.

A warning displays.



2. Tap **OK** to forget the user and be logged out, or tap **Cancel** to leave it as is.

Deletion Section:

Users can view tables and counts and delete from tables individually by clicking the **Clear** button. This allows users who are not system administrators to delete some of the data from the device. Data cannot be cleared if it is in an unprocessed state.

Enable Barcode Scanner:

The Enable Barcode Scanner option allows users to scan into any entry field if enabled. This includes both handheld and camera scanning. This option is configured per user.

If scanning on UWP, enable Code 39 (not Code 39 Full ASCII).

Admin

The **Admin** button opens the Administration page. This page allows you to view and clear logs, transaction queue, users, and local data. For more information on this page, refer to the Application Administration section.

Logout

Tap the **Logout** button to log out of the application.

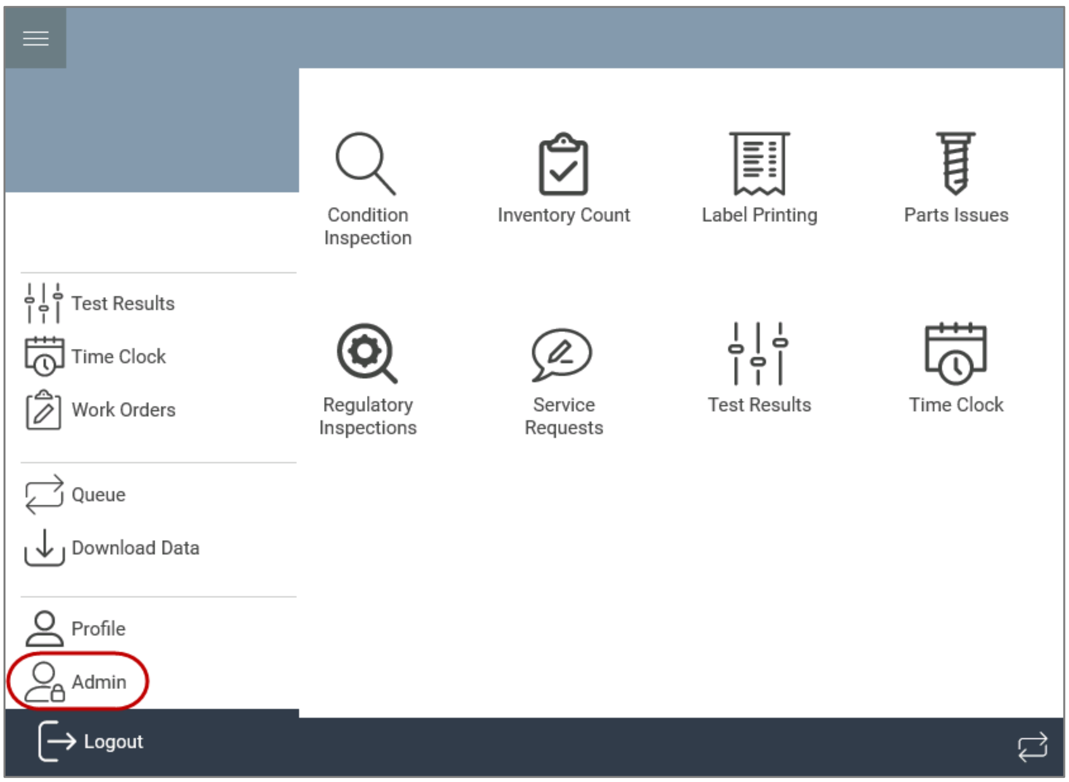
Application Administration

Use the Administration page to configure settings and view other information like data logs and queue items.

Note: The Administration page will only be seen by users configured as a System Administrator type on the User Group setup, as this page is only for use by administrative users.

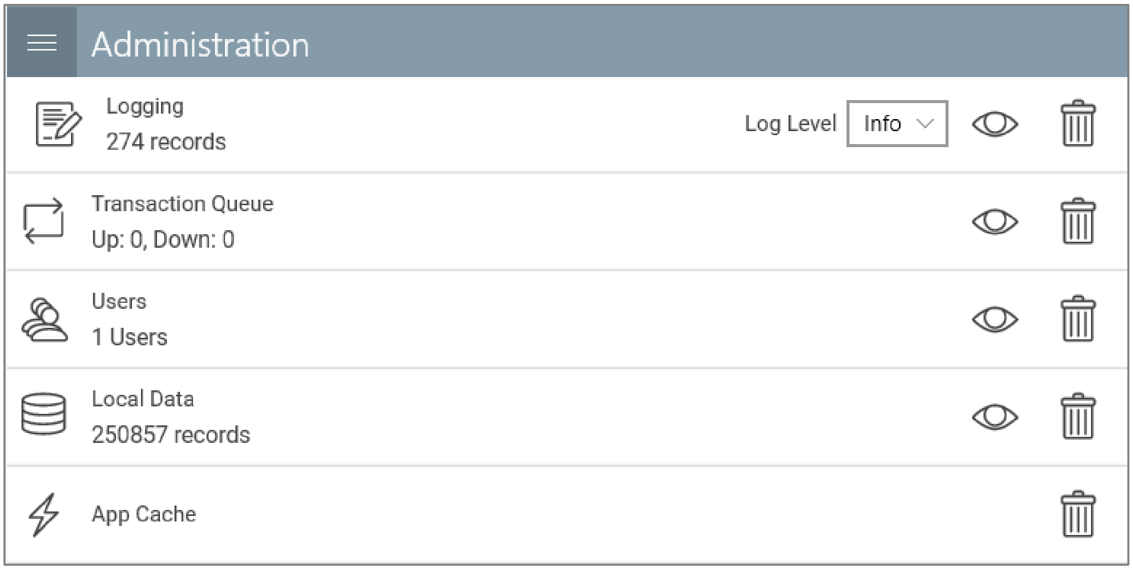
To open the Administration page:

Tap the **Admin** icon from the menu.



The Administration page displays.

General Admin



Logging

The Logging section displays the number of local logging records and allows you to view or clear the logs on the device.

Log Level Choice-list

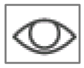
Tap this choice-list to choose which logs to view. Choices include Debug, Info, Warn, Error, and Fatal.

- **Debug:** The internal control flow and diagnostic state information to help find problems.
- **Info:** Anything of interest or that has relevance to users. This is the default minimum logging level.
- **Warn:** Indicators of possible issues or service/functionality degradation.
- **Error:** The logged information of failures in the application or connected system.
- **Fatal:** The critical errors causing completed failure of the application.

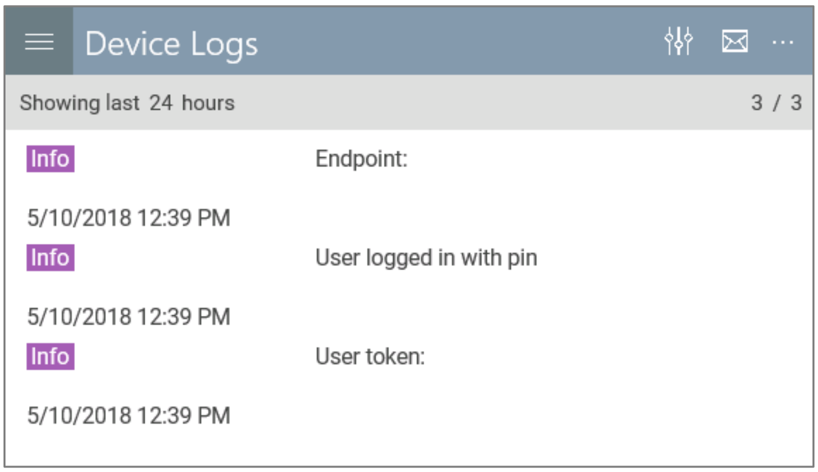
View Logs

View the available logs. The **View Logs** button opens the Device Logs page. Logs can be filtered or emailed.

To view logs:

1. Tap the view icon. 

   The Device Logs page displays.

2. Tap any individual item to see detailed information.

   The Log Info pop-in displays.

3. Tap **Close** to exit the pop-in.

4. Tap **Back** to go back to the main Administration page.

To filter logs:

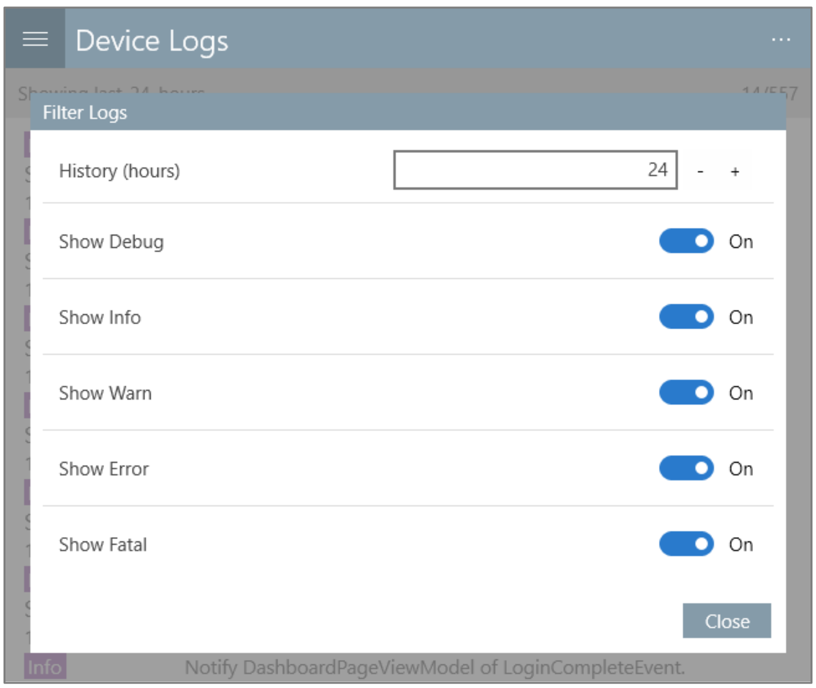
1. On the Device Logs page, tap the ellipsis button, and then tap **See More**.

Note: On some devices, the Filter and Emails buttons are displayed without a **See More** button. Skip to the next step if they are already available.

*The **Filters** and **Email** buttons display.*

2. Tap **Filters**. 

   The Filter Logs pop-in displays.



3. Use the Filter Logs pop-in to turn on and off different types of filters or change the amount of hours of log history that displays. Options include History (hours), Show Debug, Show Info, Show Warn, Show Error, and Show Fatal.

4. Tap **Close** to apply the new filters to the Device Logs page.

To email logs:

1. On the Device Logs page, tap the ellipsis button, and then tap **See More**.

Note: On some devices, the Filter and Emails buttons are displayed without a **See More** button. Skip to the next step if they are already available.

The Filters and Email buttons display.

2. Tap **Email**. 

3. The email client that is set up on the device opens with the attached log file ready to send. Fill out the necessary details and send the email.

   Note: To open the sent file on a computer, save the files to the computer and use a zip program to extract the files before use.

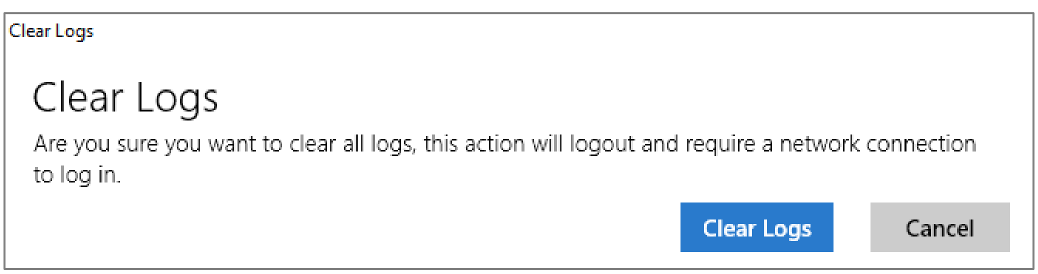
Clear Logs

Use the **Clear Logs** button to delete log data.

To clear log data:

1. On the Administration page, tap the trashcan icon  to clear logs.

   A confirmation message displays stating that you will be logged out and you are required to have a network connection to log back in to the application.



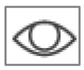
2. Tap **Clear Logs** to clear the logs, or **Cancel** to cancel the action and leave the logs as they are.

   *If you tapped **Clear Logs**, the logs are cleared and you are logged out.*

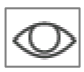
Transaction Queue

The Transaction Queue section displays the number of pending uploads and downloads, allows you to view items in the download queue, or clear the queue.

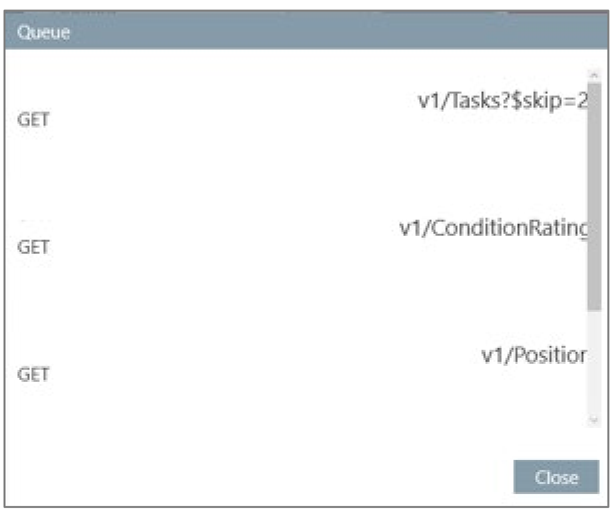
View Queue Items

Use the view icon  to access the queue, and see what is in the queue line to upload or download.

To view queue items:

1. Tap the view icon. 

   The Queue pop-in displays.

   The queue data has a type listed underneath each entry (shown as GET in the image above). These types display the type of request that it is making with the server.

   - **Get:** Retrieving data.
   - **Post:** Creating a new item on the server.
   - **Put:** Updating an existing item on the server.
   - **Delete:** Deleting an existing item from the server.

2. Tap **Close** to return to the Administration page.

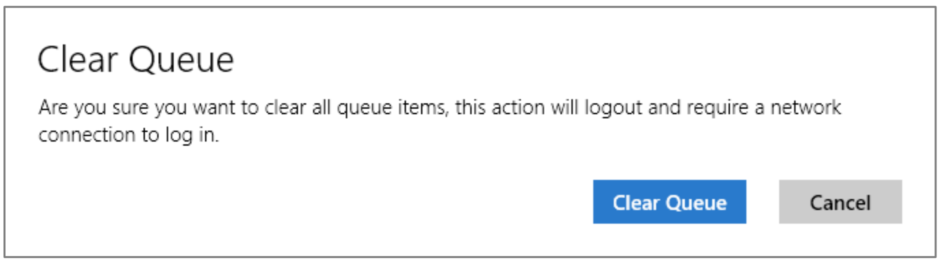
Clear Queue Items

Use the trashcan icon  to delete the queue line.

To clear queues:

1. On the Administration page, tap the trashcan icon. 

   A confirmation message displays stating that you will be logged out, and you are required to have a network connection to log back in to the application.

2. Tap **Clear Queue** to clear the queue, or **Cancel** to cancel the action and leave the queue as is.

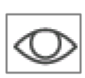
   *If you tapped **Clear Queue**, the queue is cleared, and you are logged out.*

Users

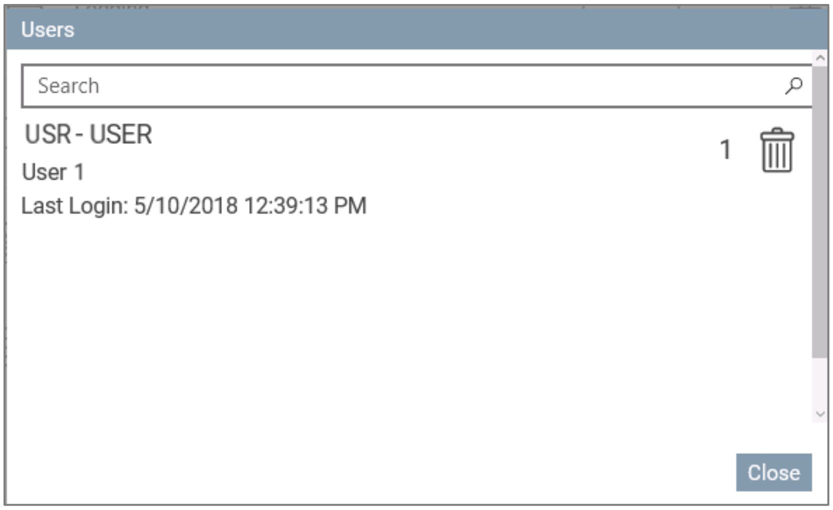
The Users section displays the number of device users, and allows you to view device users, or forget device users.

View Device Users

To view device users:

1. Tap the view icon. 

   The Users pop-in displays.



2. Once you are done reviewing users, tap **Close** to return to the Administration page.

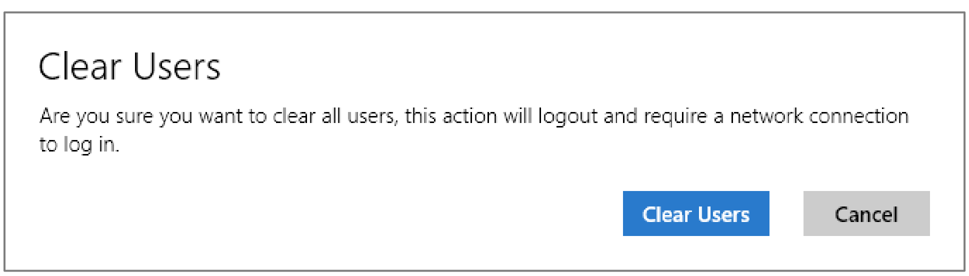
Forget Device Users

Use the trashcan icon to delete the device users from the device. This does not affect the system users. Users that have been forgotten can still log in to the device, they will just have to re-download their data.

To forget users:

1. On the Administration page, tap the trashcan icon.

   A confirmation message displays stating that you will be logged out, and you are required to have a network connection to log back in to the application.



2. Tap **Clear Users** to clear the queue, or **Cancel** to cancel the action and leave the users as they are.

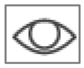
   *If you tapped **Clear Users**, all users are cleared and you are logged out.*

Local Data

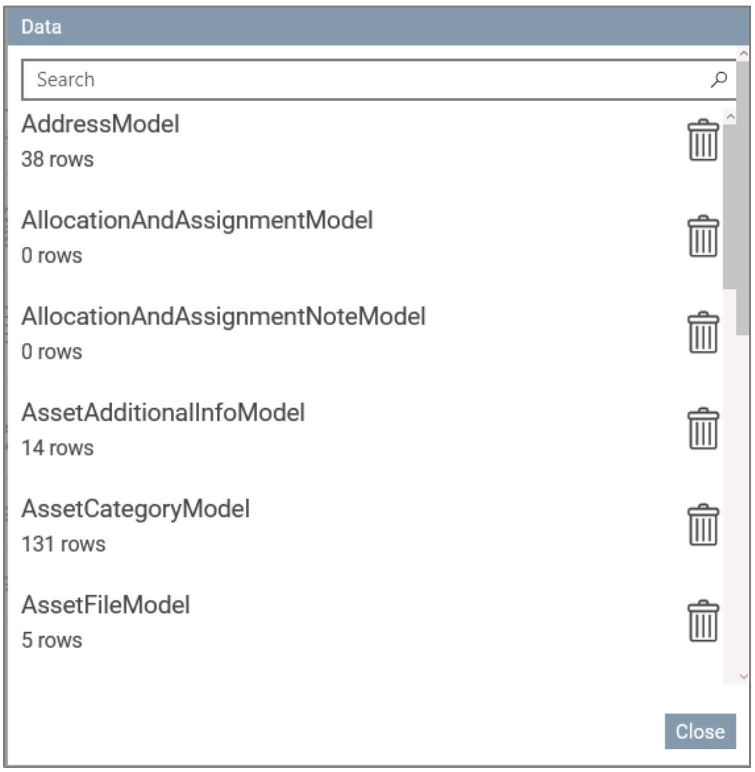
The Local Data section displays the number of local data records, and allows you to view details for those records, or clear the data from the device.

View Data Details

To view the data details:

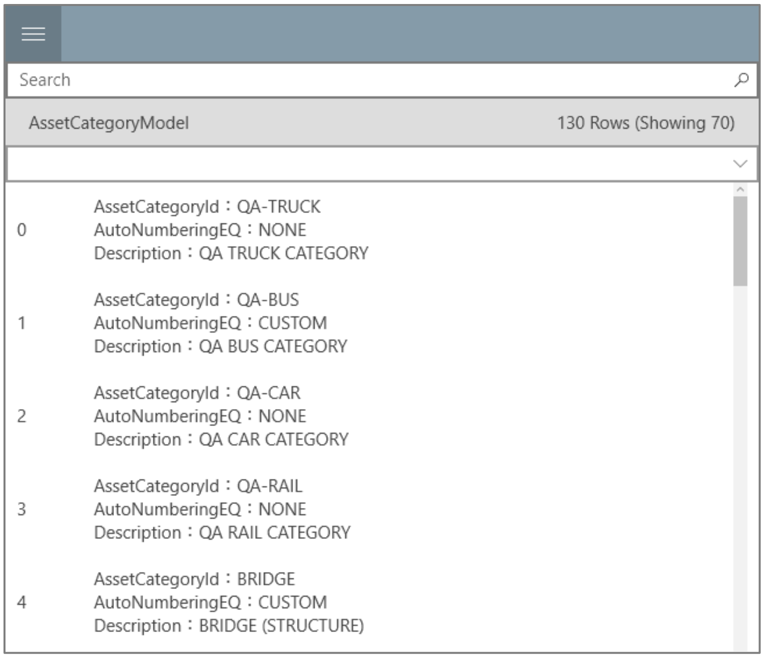
1. Tap the view icon. 

   The Data pop-in displays.

2. Tap a data row to see more information.

   A data detail page displays with more detailed information on the data rows.



3. Once you are done reviewing data, tap back, and then tap **Close** to return to the Administration page.

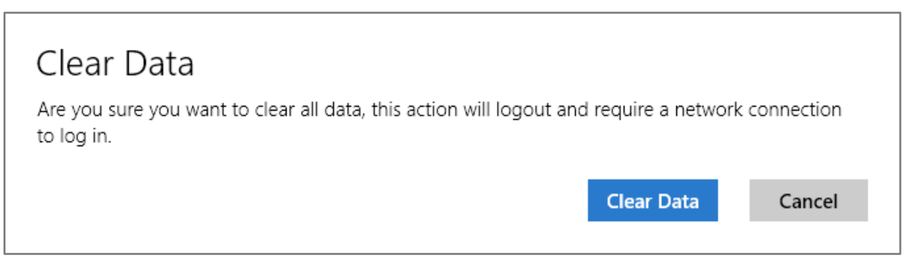
Clear Local Data

Use the trashcan icon  to delete the local data from the device. This deletes local downloaded data from the device, but does not affect the system data.

To delete data:

1. On the Administration page, tap the trashcan icon. 

   A confirmation message displays stating that you will be logged out, and you are required to have a network connection to log back in to the application.



2. Tap **Clear Data** to delete data, or you can tap **Cancel** to cancel the action and leave the data as is.

   *If you tapped **Clear Data**, all data is cleared and you are logged out.*

App Cache

The App Cache section allows you to clear the app cache.

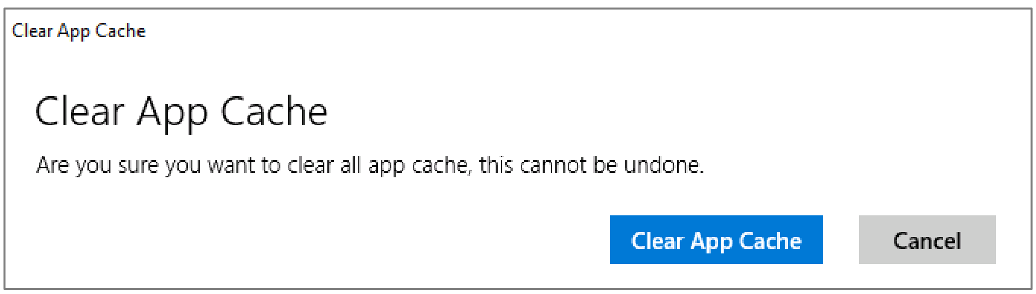
Clear App Cache

Use the trashcan icon to clear the app cache from the device. This deletes the local cache from the device.

To delete the cache:

1. On the Administration page, tap the trashcan icon.

   A confirmation message displays.

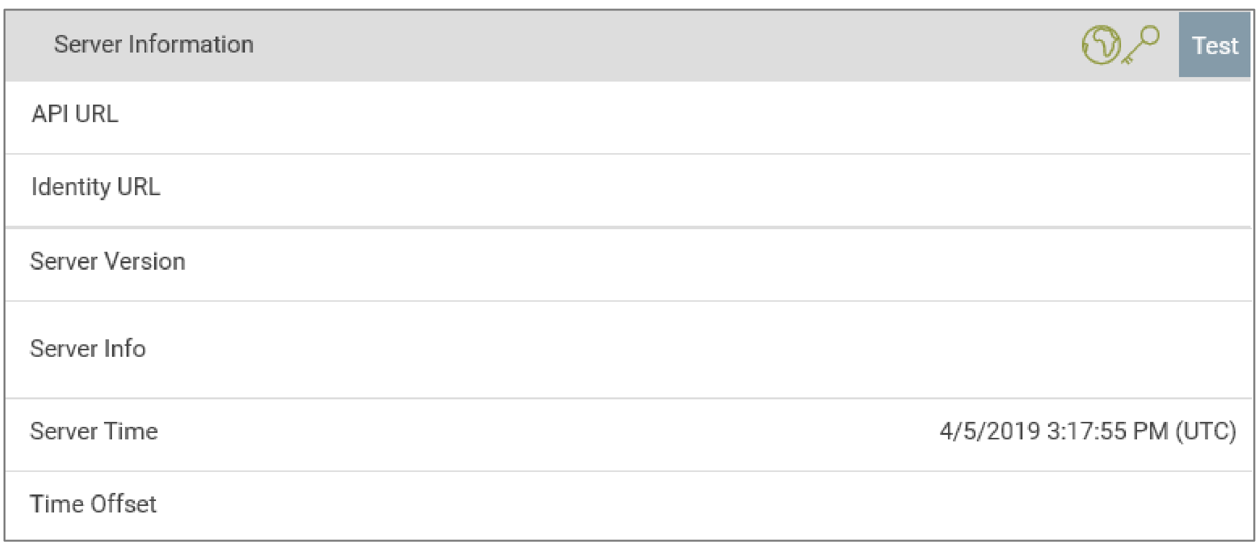
   

2. Tap **Clear App Cache** to delete the cache, or you can tap **Cancel** to cancel the action and leave the cache as is.

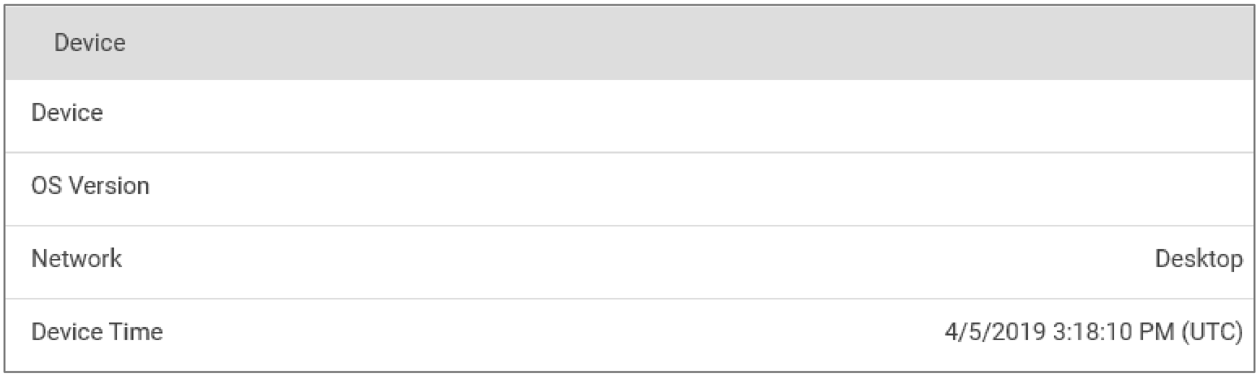
   *If you tapped **Clear App Cache**, the cache is cleared and you are returned to the Administration page.*

Options

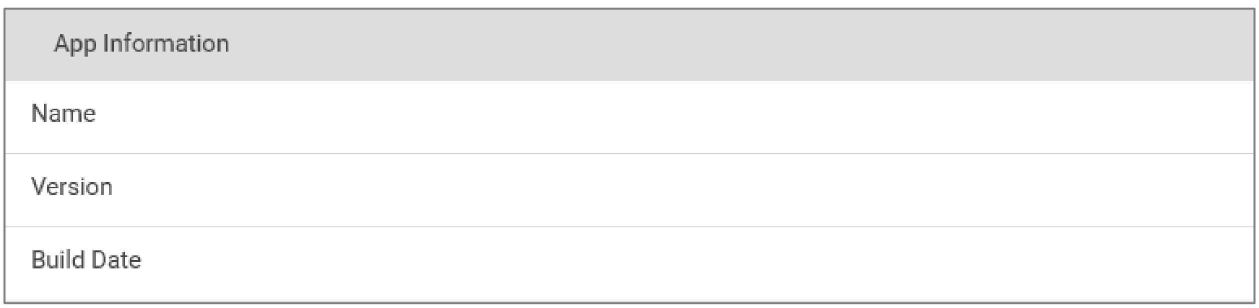
Server Information



Device



App Information

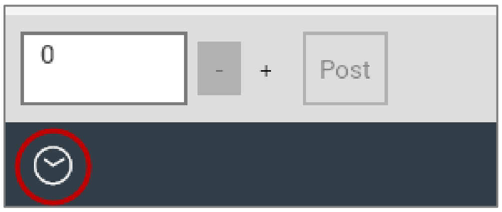


Endpoint Testing

Time Management

Use the Time Management pop-in to post labor, track task time in real time, and clock in and out. Open the Time Management area by clicking the clock icon in the lower-left hand corner from anywhere in the EAM Mobile application.

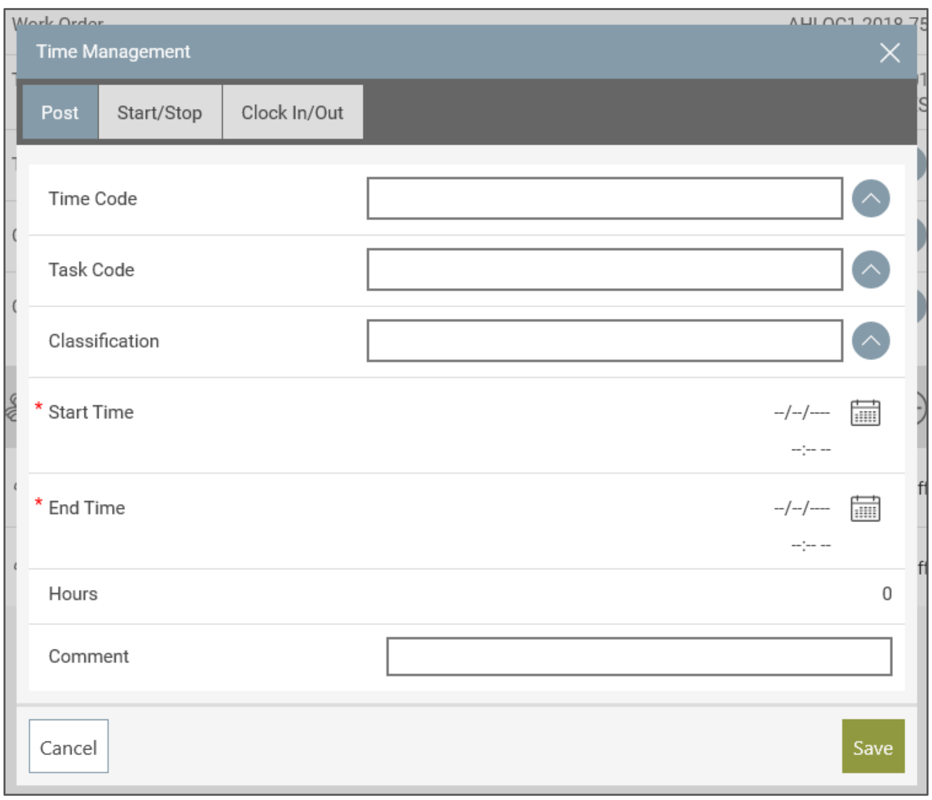
The available tabs that display for the Time Management pop-in depend on the Labor Tracking Settings for the location the user is logged in to. For more information on these settings, refer to *General Application Information: Section 2. Location Settings Profiles, Labor Tracking Settings*.



To post time:

1. Open the Time management pop-in.

   The Time Management pop-in displays.



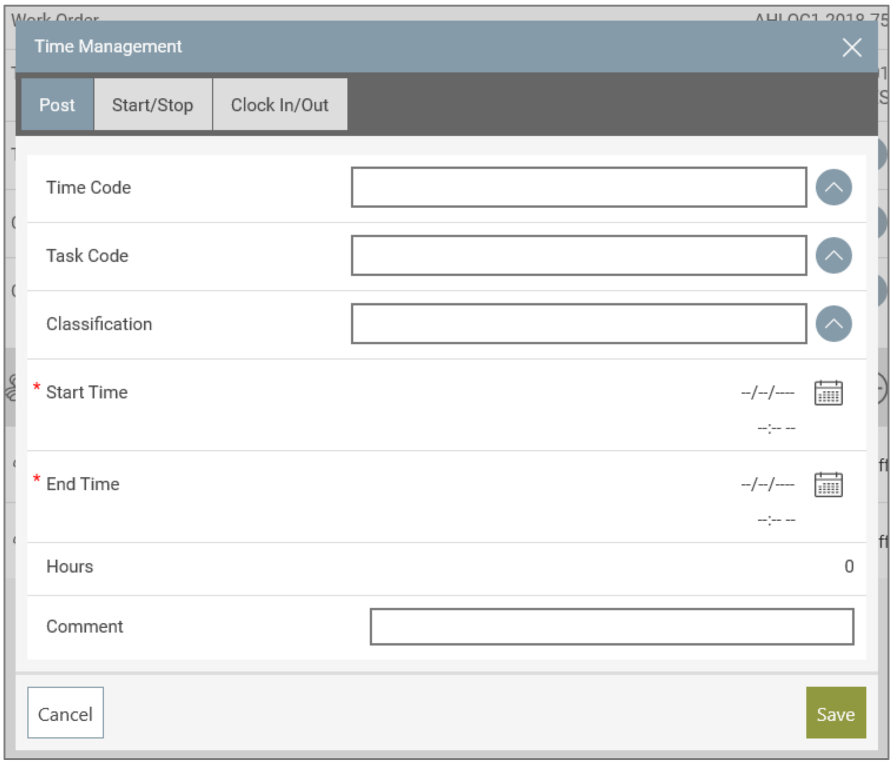
2. On the **Post** tab (the default tab), enter the time information including a time code, task code, classification for the task, the start and end time, and any comments needed for defining or adding extra information for the task.

3. When you are finished adding information, tap **Save** to save and post the time or tap **Cancel** to exit without saving.

To track labor in real-time:

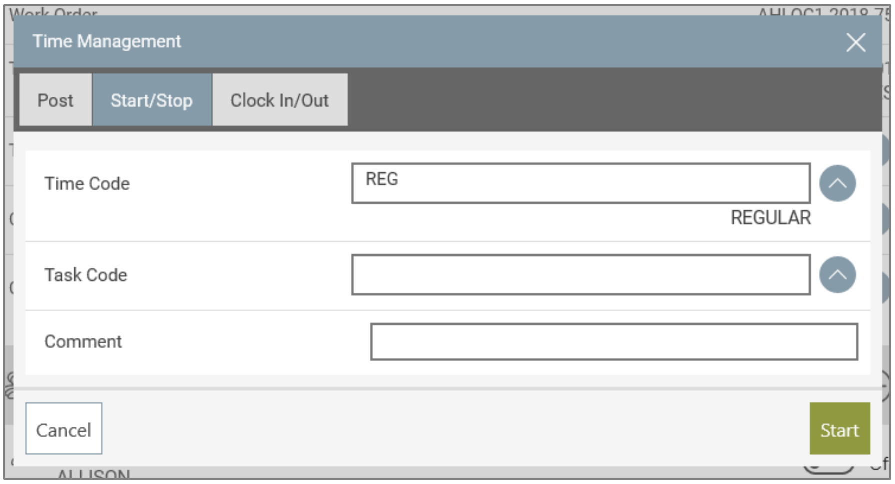
1. Open the Time management pop-in.

   The Time Management pop-in displays.



2. Tap the **Start/Stop** tab.

   The Start/Stop tab displays.



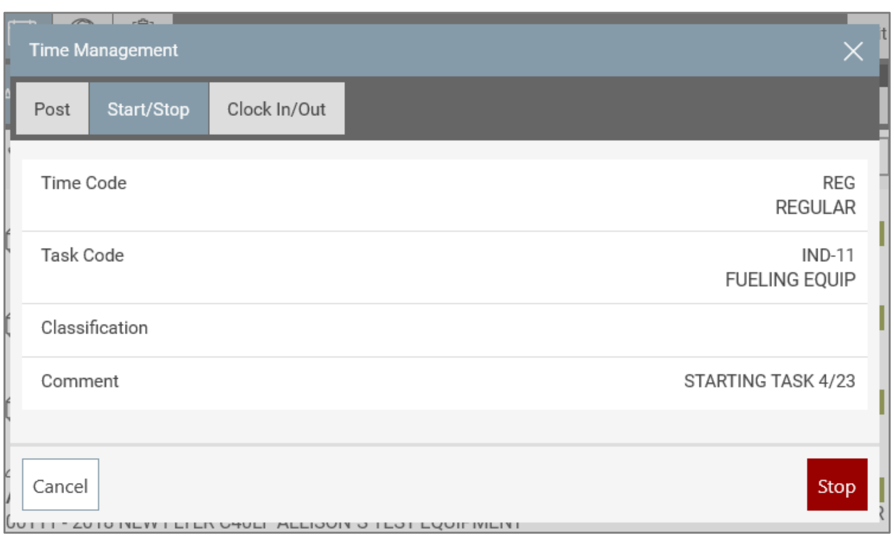
3. Enter the needed information for the time tracking including the time code, task code, or comments as needed.

4. Tap **Start**.

   The timer starts, and the EAM Mobile application displays the time spent on the task at the bottom of the screen. This is persistent and will display on the bottom of the application until you finish tracking time.

5. Once the task is done, follow the same steps as above to get to the Start/Stop tab.

   The tab displays the task you are jobbed on to.



6. Tap **Stop** to stop the time keeping on the task or **Cancel** to leave and keep tracking time.

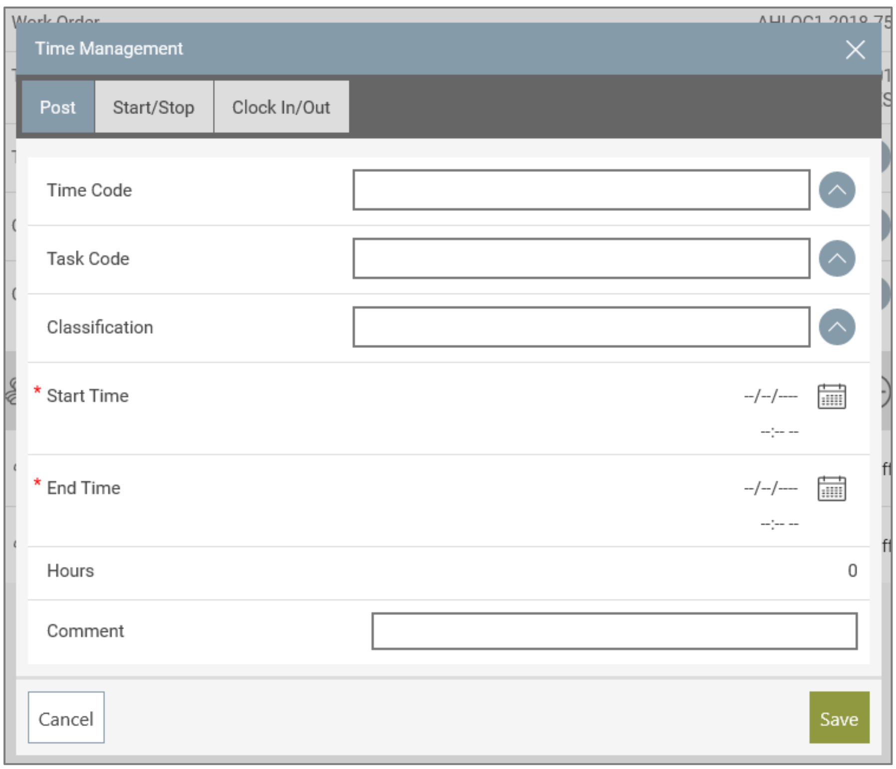
   The time is posted and can be viewed on the time card page, or wherever else you check your time postings.

To clock in and out:

Note: Users can be required to clock in before navigating to the Crew Management, Part Issues, Work Orders, Test Results, or Service Requests portals when the "Mobile Location Settings -> Use clock in/out (Mobile only)" is checked.

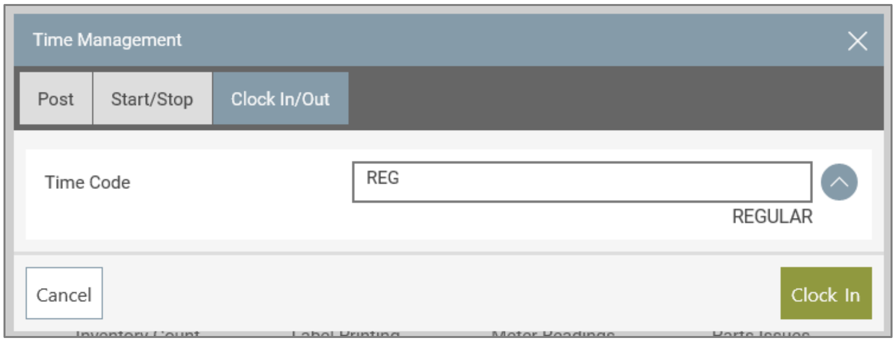
1. Open the Time management pop-in.

   The Time Management pop-in displays.



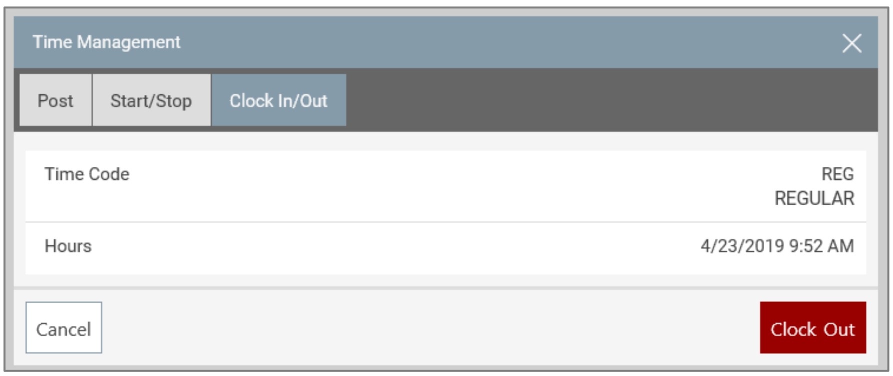
2. Tap the **Clock In/Out** tab.

   The Clock In/Out tab displays.



3. Choose the Time Code in which to clock in to.
4. Tap **Clock In** to clock into the time code, or tap **Cancel** to leave this pop-in and not clock in.

   The pop-in displays the time and date in which you clocked in to the code.



5. Once the day or time on the time code is finished, return to this tab and tap **Clock Out**.

   You are then logged out on the time code.

7. Portals

The following portals are available within EAM Mobile. Click the portal title in the table or scroll down to be taken to a detailed description of the portal.

Portals	Description
Asset Management	View, create, update asset information
Assignment Verification	Verify a set of inventory for the current session location
Crew Management	Crew foremen can manage the employees on their crew
Dock Receipts	Create and edit dock receipts for receiving parts and putting them away
Inventory Count	Count inventory for the current session location
Label Printing	Connect printers and print out barcodes for locations, parts, and bins
Meter Readings	Enter a new meter reading and comment, or view meter history
Parts Issues	Request, issue, and return parts in the field
Pick Lists	Move parts associated with pick lists in the current session location
Put-away Cards	Move parts associated with put-away cards in the current session location
Service Requests	Create a new service request
Test Results	Enter test results
Time	Record, edit, or reverse time, and review timesheet summaries
Work Orders	Create or edit work orders, and see history of work orders for an asset

Asset Management

This portal gives access to the tools you will need to manage assets. It allows you to create a new asset in the field, as well as search a specific asset for the purpose of viewing or updating its information or reviewing submitted service requests and work orders. Assets can be searched for by Asset Number.

There are two main workflows which can be completed within the portal: new asset creation and the viewing or editing of existing assets.

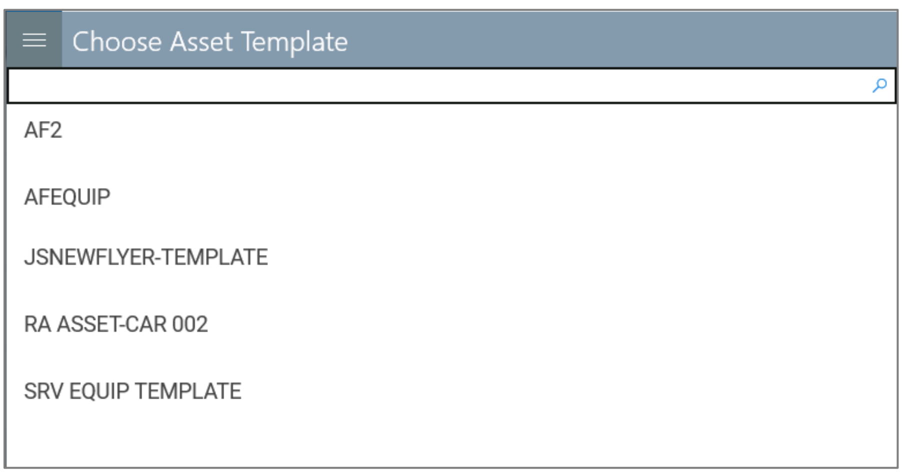
Creating an Asset

Upon initial login, all data necessary to create a new asset is available.

To create an asset:

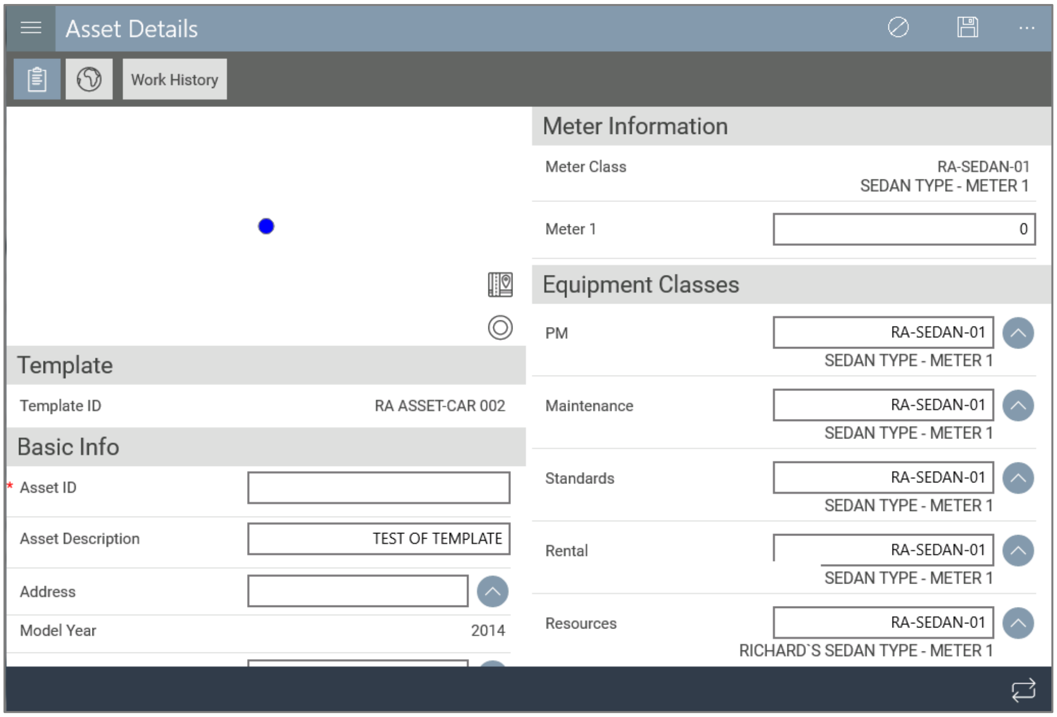
1. Tap the  icon in the toolbar.

   The Choose Asset Template pop-in will display.

2. Select the template from the list.

   The Asset Details page will display.



3. Complete the fields for your asset.

   i. If manually entering Asset ID, only valid characters are allowed. This includes:

      - A – Z
      - 0 – 9
      - Hyphen (–)
      - Period (.)
      - Space

4. Click the  icon to add the asset.

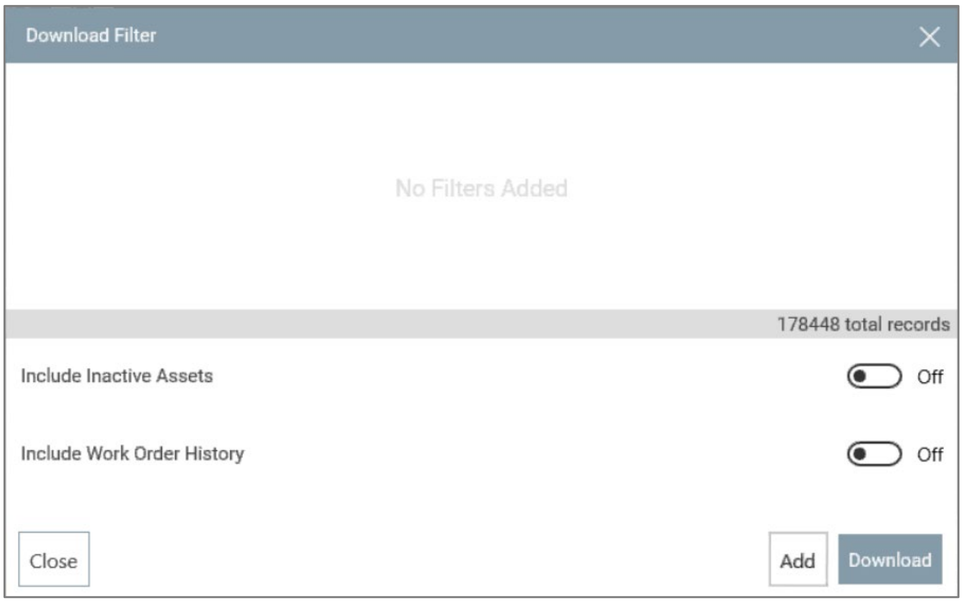
Reviewing or Editing an Asset

This portal also allows you to view and edit the assets downloaded to your device.

To download assets:

1. Tap the  icon to open the Download Filter pop-in.

   A blank Filter pop-in will display where you will need to choose asset filters.

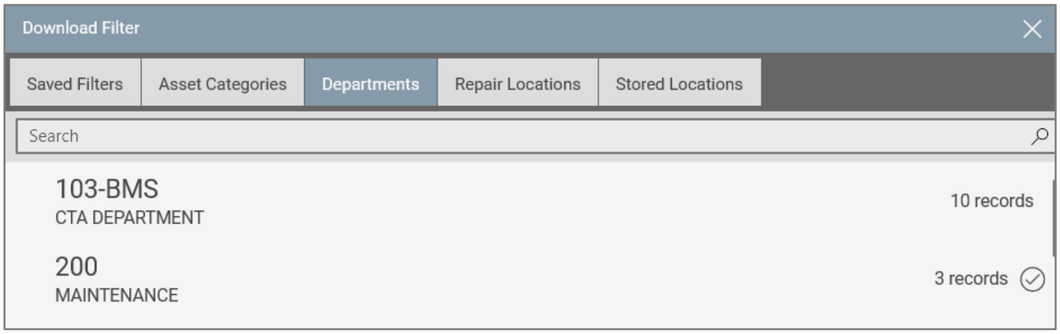


2. Click **Download** only if you intend to download all assets with no filters.

   If you do not add a filter the following warning will display. Click **OK** if you would like to download all assets.

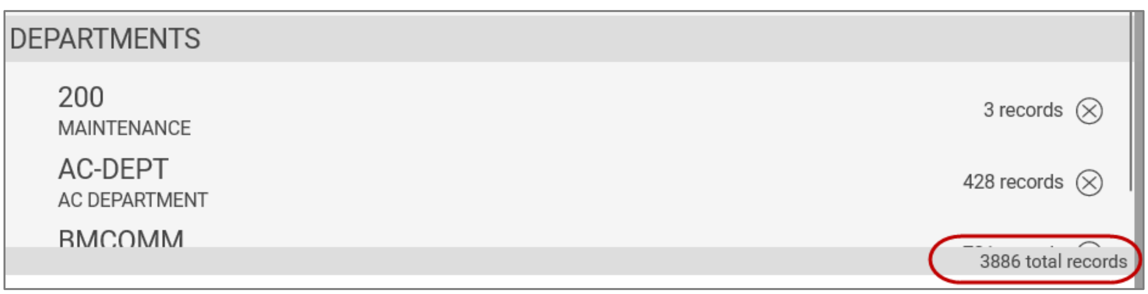
3. Click **Add** to add filters to the information to be downloaded.

   The filters display.



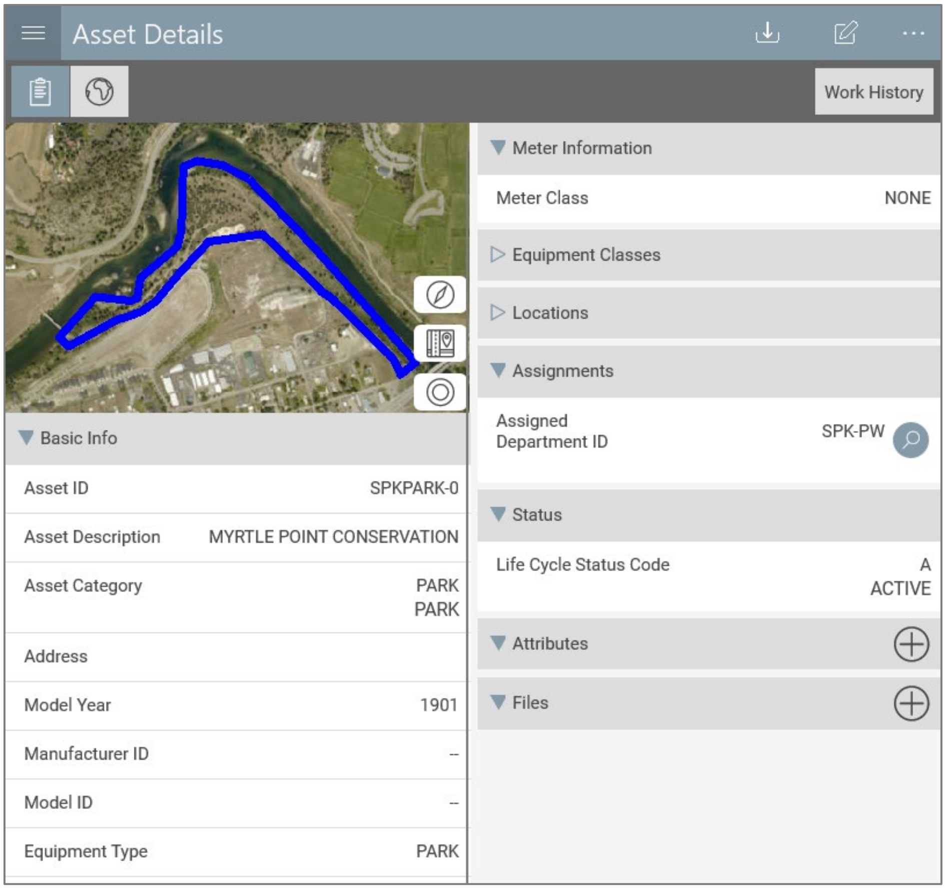
4. Tap to select a filter category tab.
5. Tap the item filter to select it for the filter. Use the search field to narrow down the list. Selected items have a checkmark added on the right side.
6. Continue selecting items for the filter until all categories are added.
7. Tap **Add** to add these to the filter.
8. The number of records that will be downloaded displays below the selected filters.

Note: If there are records that apply to several categories above, the record is only counted once, and not duplicated. So this number may not be an exact match to the records listed.



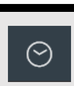
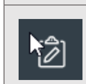
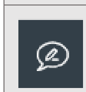
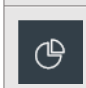
9. On the Download Filter pop-in, click the X next to any category to remove that selection.
10. Tap the toggle switches to turn on or off the options for **Include Inactive Assets** and **Include Work Order History**.
11. When you are finished adding filter categories, click **Download**.

Tapping the  icon switches to viewing the assets on a map if enabled. Click on the asset to be taken to the **Asset Details** page.



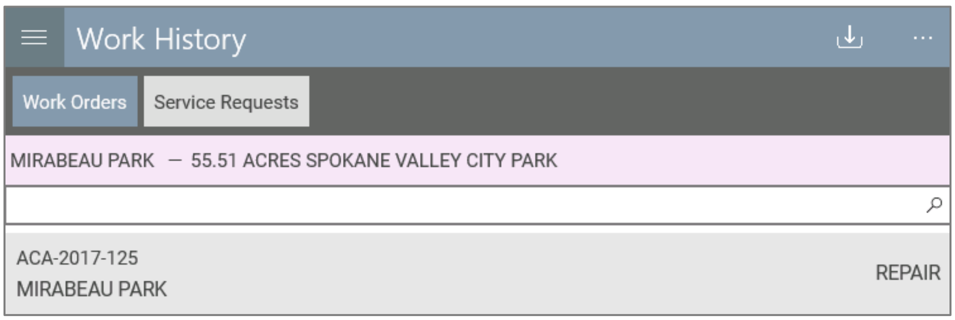
The Asset Details page displays a Map (if configured), Basic Info, Meter Information, Equipment Classes, Locations, Assignments, Status, Attributes and Files for the selected asset.

The information bar at the bottom of the application allows users to complete additional functions as explained in the table below. Clicking on the corresponding icon will launch the pages for that workflow.

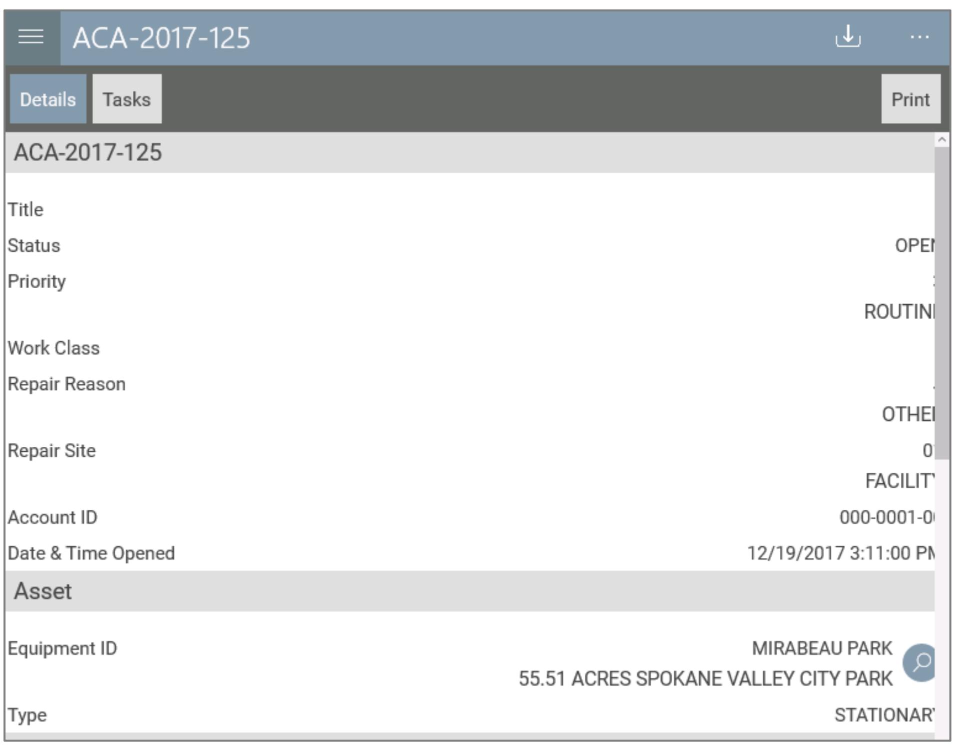
Icon	Description
	
	Create a New Work Order
	Create a New Service Request
	Enter Usage

Icon	Description
	Attach a file or photo
	Administrative Quick Access (if authorized)
	Queue Manager

Work History



Tapping a history item launches the details about that work order or service request where you can view either the details or related tasks by clicking the **Details** or **Tasks** button.

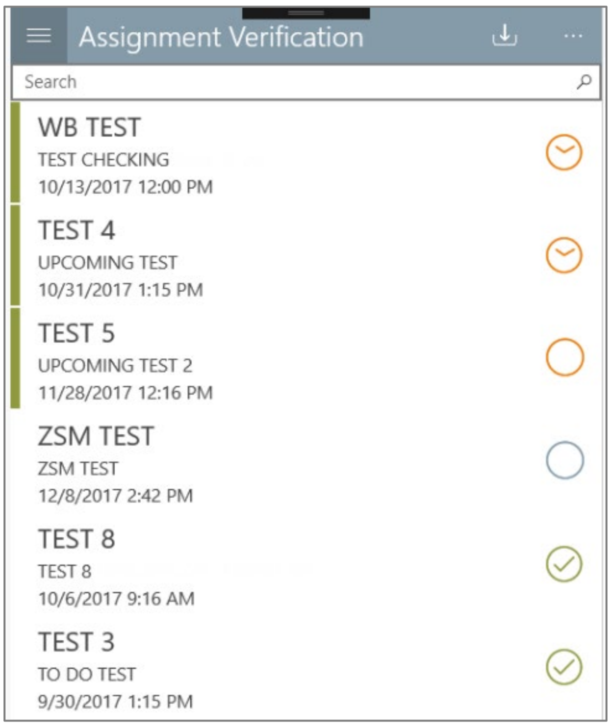


Tapping the **Print** button allows you to print the details of the work history if configured.

Assignment Verification

This portal is responsible for allowing a user to verify a set of inventory. Inventories are generated by use of the Asset Inventory Management, Asset Inventory Criteria, and Asset Inventory Assignment List screens in the Enterprise Portal.

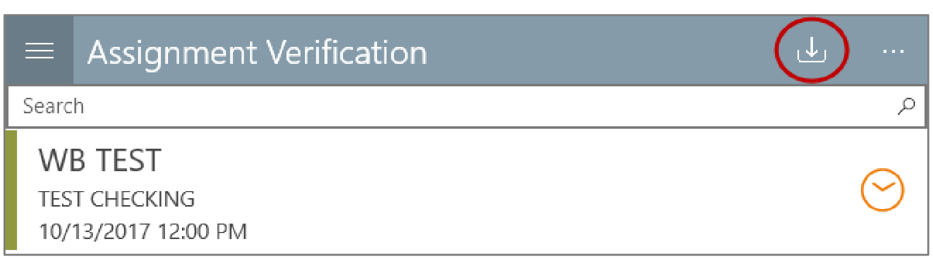
When you open the Assignment Verification portal, the assignment list displays on the portal's home page. Each assignment list displays the Asset Inventory Management check ID, the description, and the project completion date and time. Each line also has an icon to the right displaying the state of the assignment as described below.



Download Assets

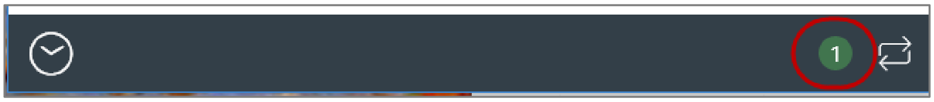
To download the items for Asset Inventory Management:

➡ In the top-right corner, tap the **Download** button.



The assets download and display in the Asset Inventory Assignment list. The assets downloaded are the Asset Inventory Management records that are assigned to the *current user's employee, and the related Allocation and Assignment records for the list's items in each of the management records.*

When downloading, a progress number displays in the bottom-right corner.



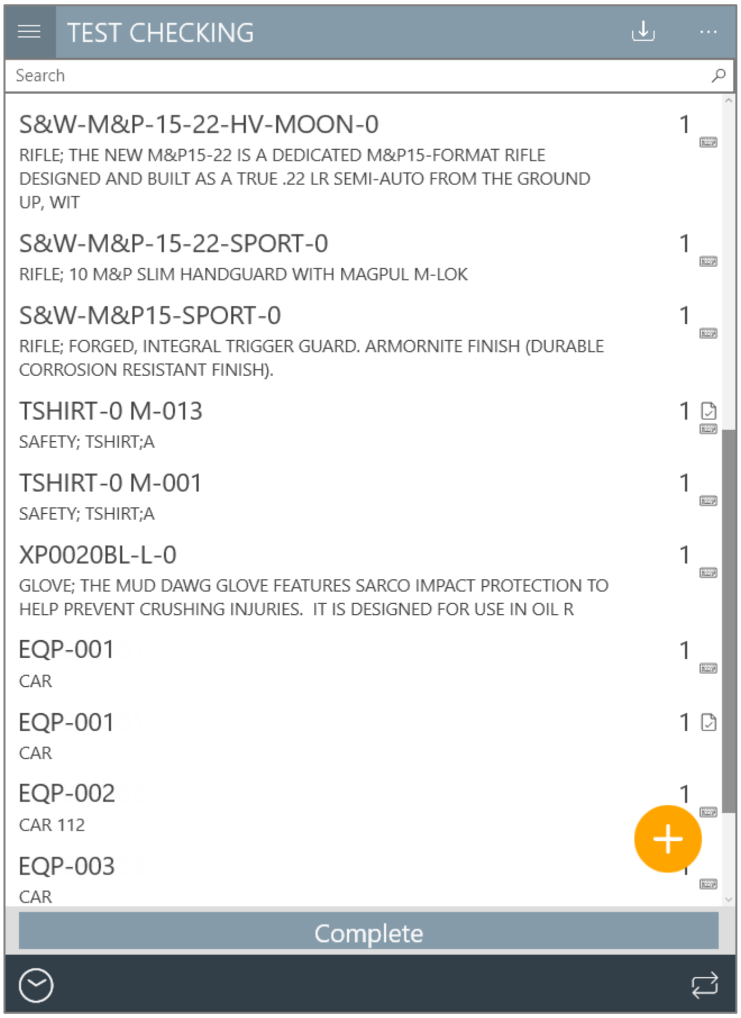
Icon Information

Below is the list of icons and text, and their meanings for the list of assets.

Icon	Description
	Orange Clock: This item is past due
	Orange Circle: This item is a to-do item.
	Blue Circle: This item is upcoming.
	Green Clock: The item is complete.
	Green Bar: An item with a green bar to the left indicates that the item has been started.

Assignment Item List

The assignment list displays items that need to be verified. Tap an item from the Assignment Verification to open the item's assignment list. Items are displayed with the part ID, suffix, and serial number as the title of each item (if items have details for these options, otherwise, the items will have at least the part ID), along with the part keyword and description below.

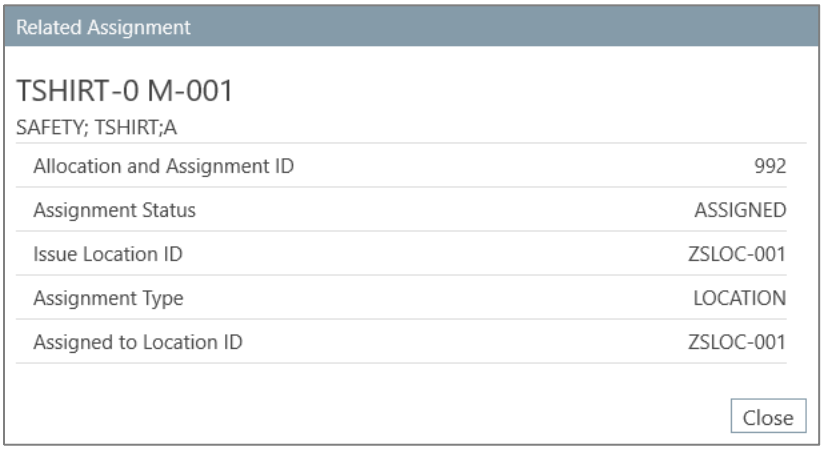


To see related assignments for an item:

1. Long-press the item to display the context menu.

2. Tap **More**.

3. The Related Assignment pop-in displays.



4. After reviewing the necessary information, tap **Close**.

Icon Information

Below is the list of icons and text, and their meanings for the list of assets.

Icon/Text	Description
	A blank paper indicates the item is missing.
	A checked paper indicates the item has been verified with no discrepancy.
	A paper with a plus sign indicates extra inventory items were found in inventory.
	The keyboard icon means this item has been manually verified.
	The barcode icon indicates that the item has been verified by scan.
1	This is the quantity of the items.
Blank	No icon next to the item means there has been no verification for this item.

Verifying Correct Inventory

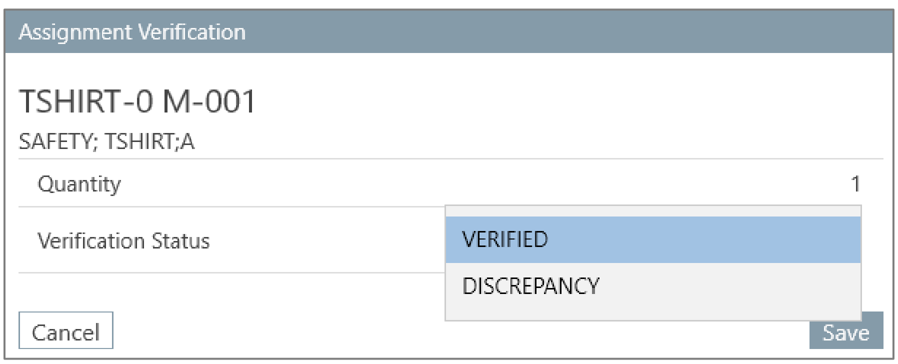
To verify inventory:

1. Tap an item in the assignment list.

   The Assignment Verification pop-in displays.

2. To verify if the quantity, tap the drop-down menu and tap **VERIFIED** to verify the number.

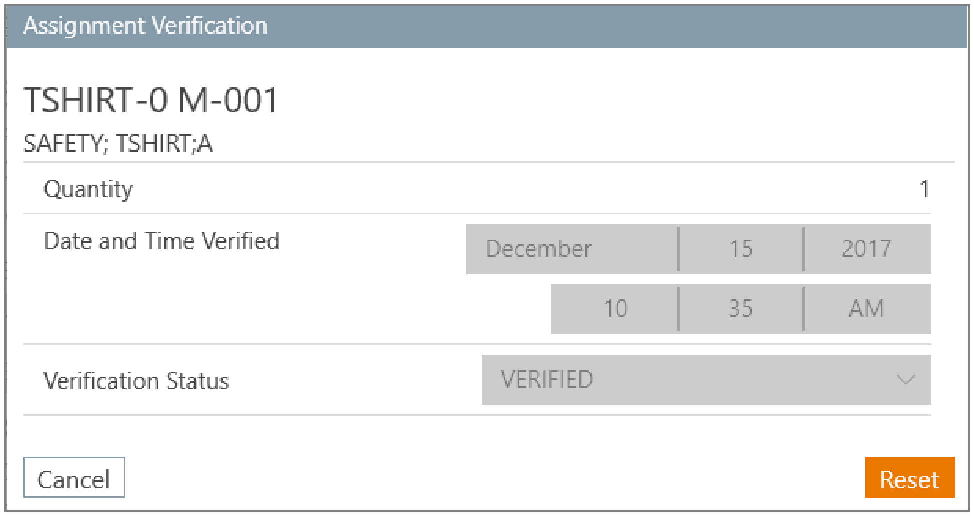
   

3. Tap **Save** to save the verification, or **Cancel** to exit the verification pop-in without saving.

   The assignment list displays again, and the item's icon updates to reflect the new status.

4. If you tap the item again, the Assignment Verification pop-in now displays the date and time verified. This information is set, and not editable.

   Note: If an item was verified incorrectly, tap **Reset** to reset the verification status.



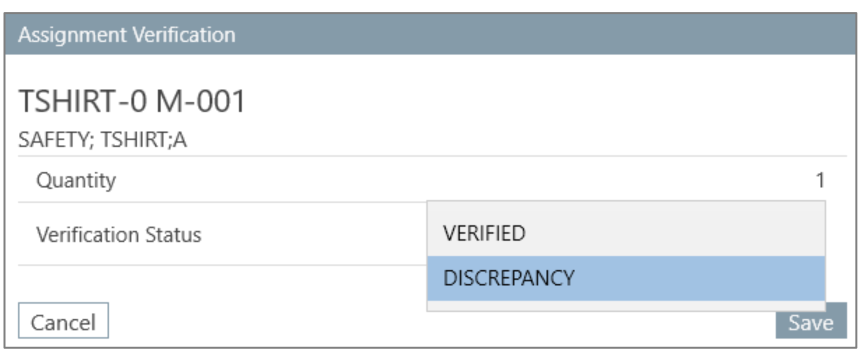
Verifying an Inventory Discrepancy

To verify inventory:

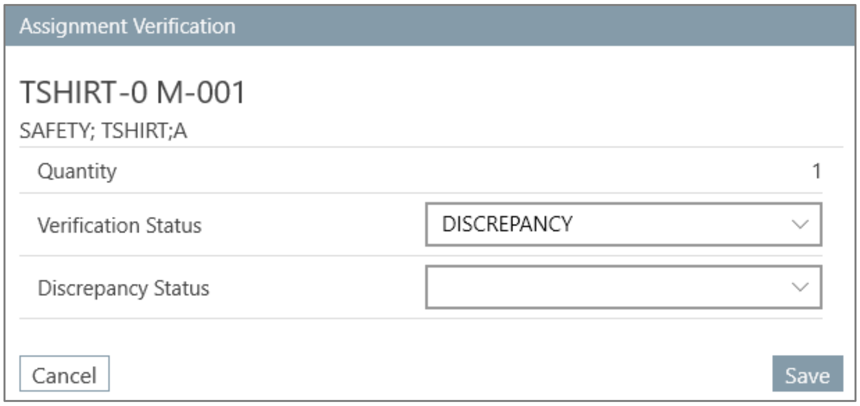
1. Tap an item in the assignment list.

   The Assignment Verification pop-in displays.

2. To set an item as a discrepancy, tap the drop-down menu, and tap **DISCREPANCY.**



   *The **Discrepancy Status** field displays.*



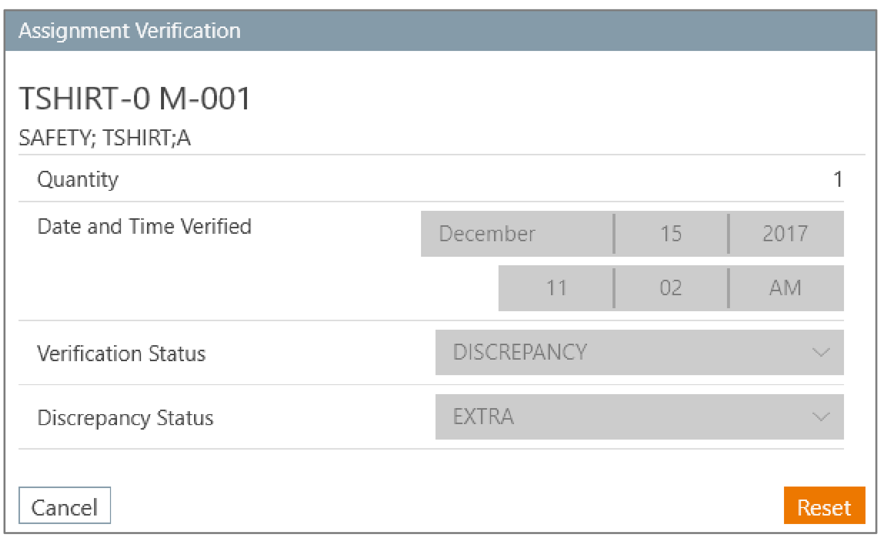
3. Set the Discrepancy Status as either **EXTRA** or **MISSING**.

4. Tap **Save** to save the verification, or **Cancel** to exit the verification pop-in without saving.

   The assignment list displays again, and the item's icon updates to reflect the new status.

5. If you tap the item again, the Assignment Verification pop-in now displays the date and time verified. This information is set, and not editable.

   Note: If an item was verified incorrectly, tap **Reset** to reset the verification status.

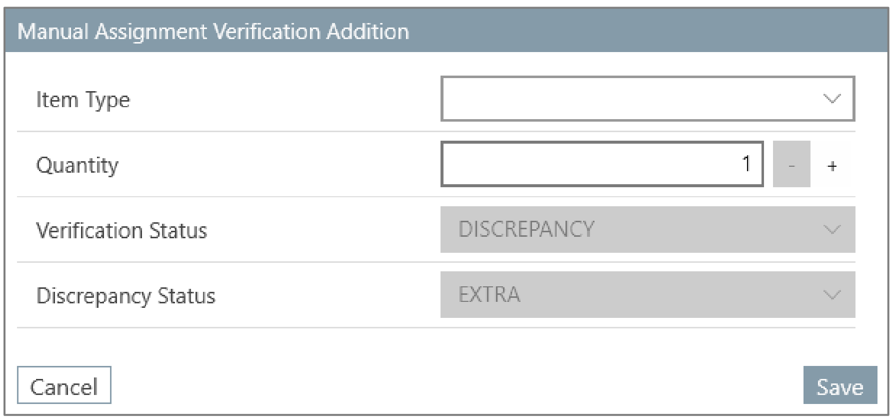


Adding a New Item Manually

To add a new item:

1. From the Assignment Item list, tap the yellow plus sign button.

2. The Manual Assignment Verification Addition pop-in displays.



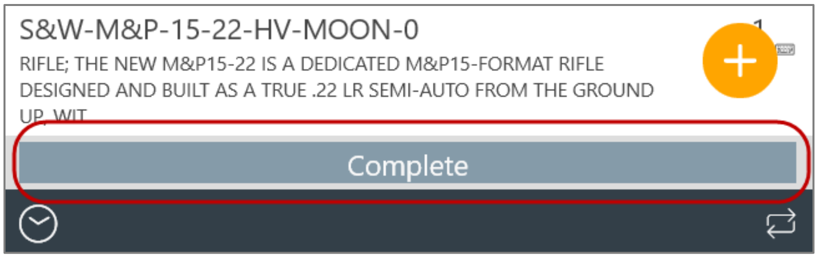
3. Enter the information for the item being added to the inventory. Fields include Item Type, Quantity, Verification Status, and Discrepancy Status.
    - **Asset:** When entering a new asset, the Equipment ID field also displays.
    - **Part:** When entering a new part, the Part ID, Part Suffix, and Serial Number fields display.
4. When you are done adding information, tap **Save**, or tap **Cancel** to leave this pop-in without saving.

Completing the Inventory

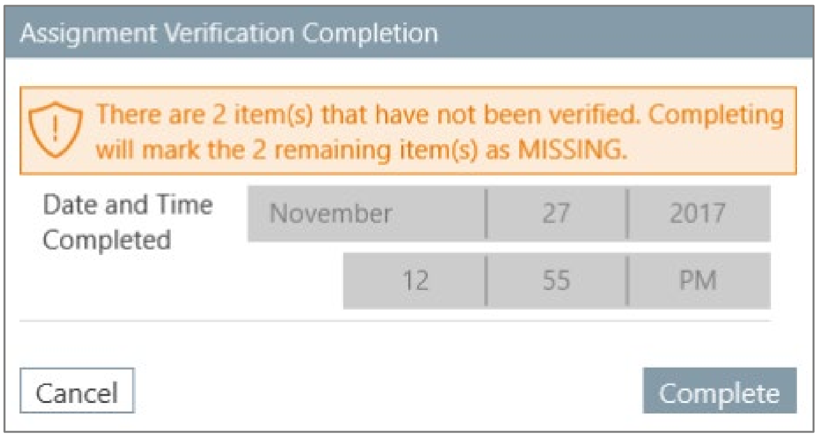
Once you are done verifying the inventory items, complete the inventory using the following procedure.

To complete the inventory:

1. When you are ready to complete the inventory, at the bottom of the inventory list, tap **Complete**.

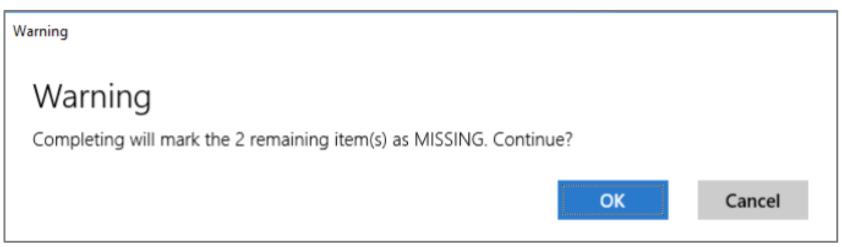


The Assignment Verification Completion pop-in displays. If there are any items missing, a verification message displays.



2. Tap **Complete** to complete the inventory, or **Cancel** to leave without completion.

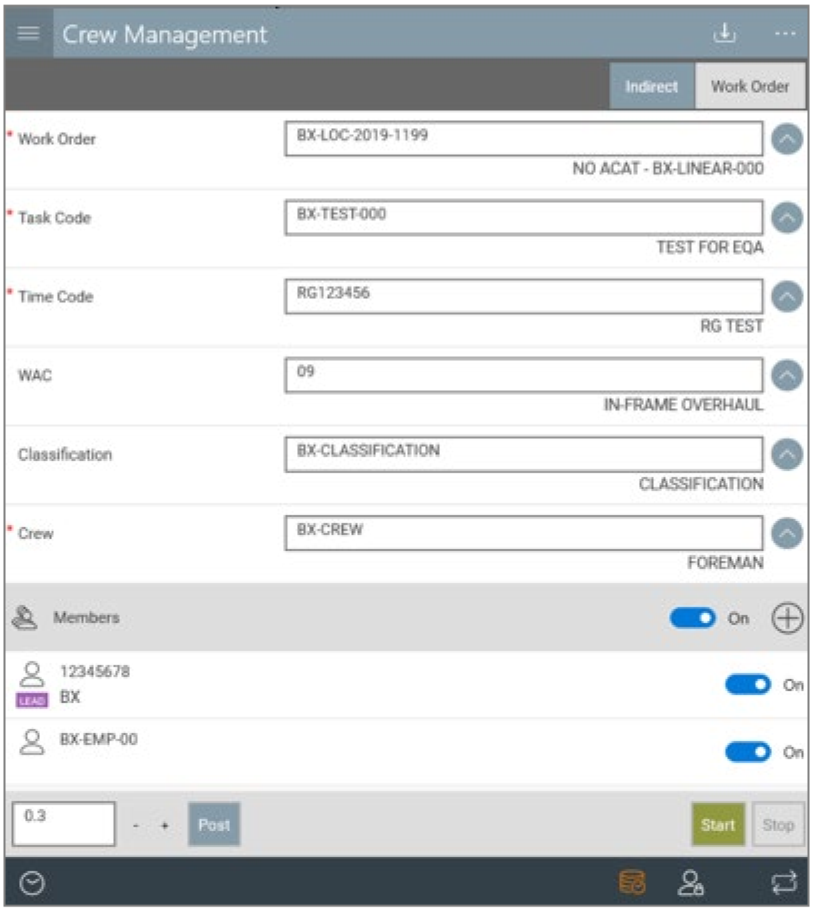
    - If you tap **Complete** when there are unverified items, a final warning message displays to ensure you want to complete the inventory with the unverified items. Tap **OK** to finish.



Crew Management

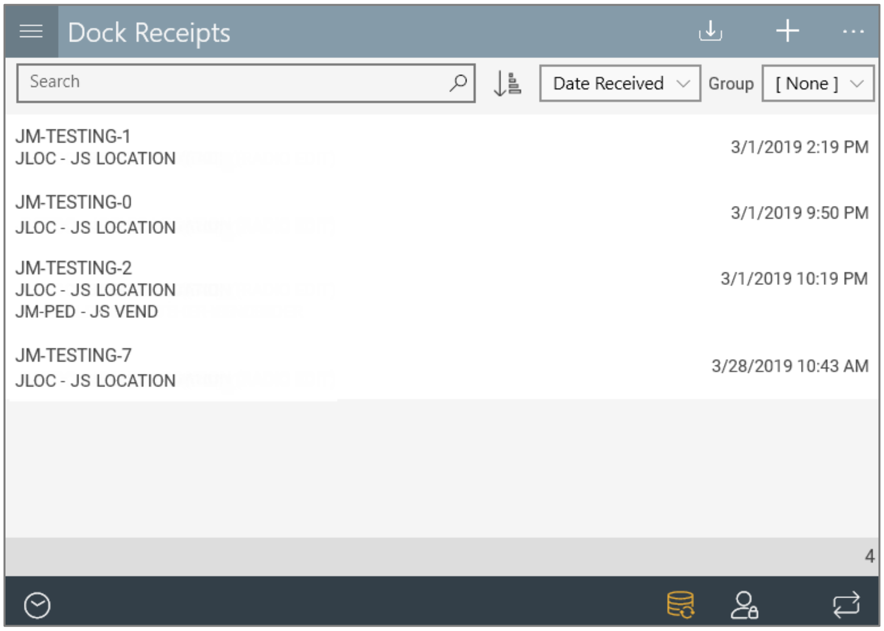
The Crew Management portal allows crew foremen to manage the employees on their crew, conveniently from their own work portals. Foremen can start and stop tasks, assign employees and their crews, and perform other actions for their crews such as time entry, and adding or removing employees from crews.

Crew leads can also perform labor time entries for the crew in the field or specify WAC codes when posting or starting labor.



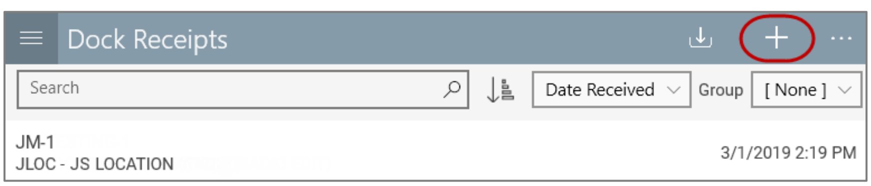
Dock Receipts

The Dock Receipts portal allows users to create and edit dock receipts and line items for receiving parts and line items and putting those items away.

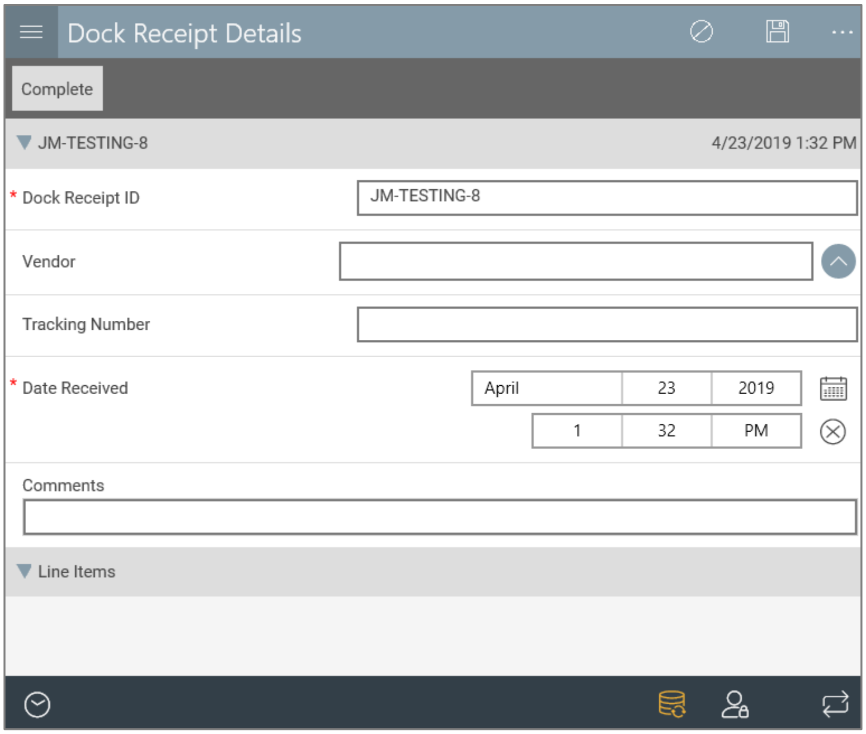


To add a dock receipt:

1. In the Dock Receipts portal, tap the + button.



2. The Dock Receipts Details page displays.



3. Enter the dock receipt information as needed. Dock Receipt ID and Date Received are required. Other optional information includes the vendor, tracking number, and any comments

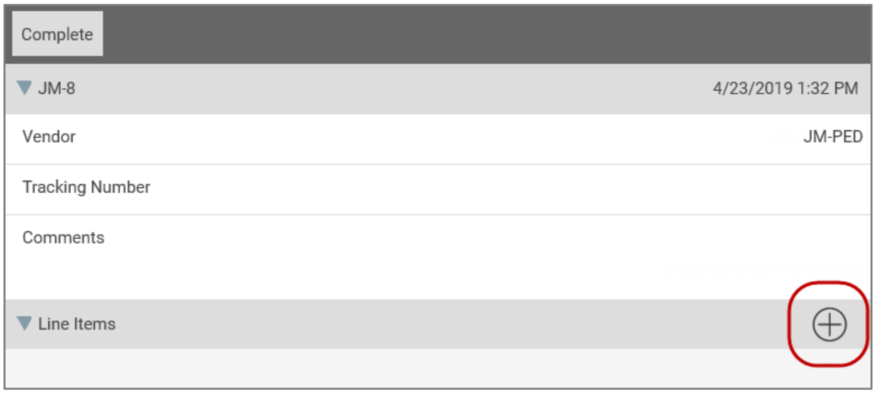
4. After entering the receipt information for the line items, tap the save icon.

The dock receipt is created and will be saved to the network once you are connected.

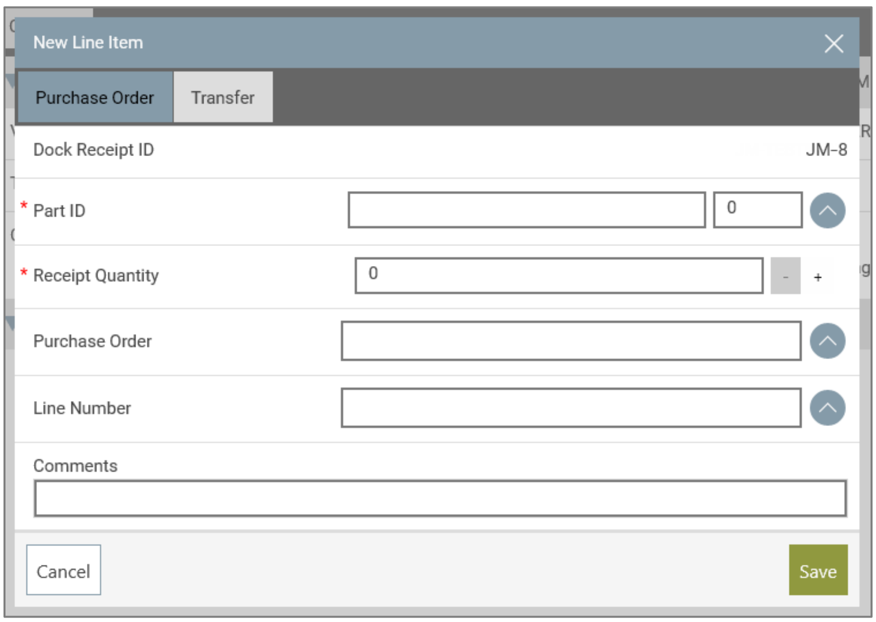
To add line items to a dock receipt:

1. From the Dock Receipts portal main page, tap the dock receipt to open it.

2. Tap the **+** icon on the Line Items section.



The New Line Item pop-in displays.



3. Tap either the **Purchase Order** or **Transfer** tabs to enter the correct type of line item.

4. Enter the information for the received line item. Details include the part ID and receipt quantity (both required) and optional purchase order (Purchase Order tab), Transfer ID (Transfer tab) and line number, and comments.

5. After entering the line information, tap **Save**, or **Cancel** to exit the pop-in without saving information.

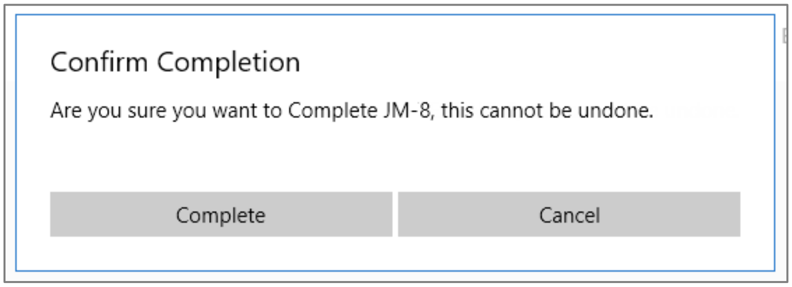
To complete a dock receipt:

1. From the Dock Receipts portal main page, tap the dock receipt to open it.

2. Tap **Complete**.

Once a dock receipt is completed, it cannot be undone. Be sure the dock receipt is finished before completion.

A confirmation message displays.

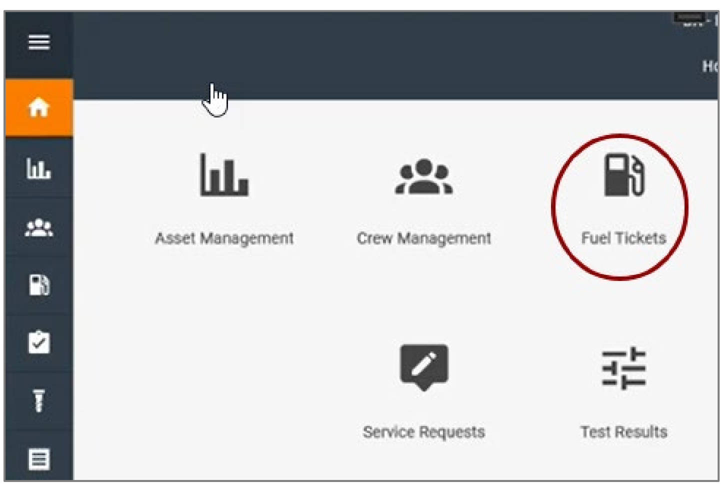


3. Tap **Complete** to complete the receipt, or **Cancel** to leave and keep the dock receipt open.

   The dock receipt is closed and no longer displays in the receipts area.

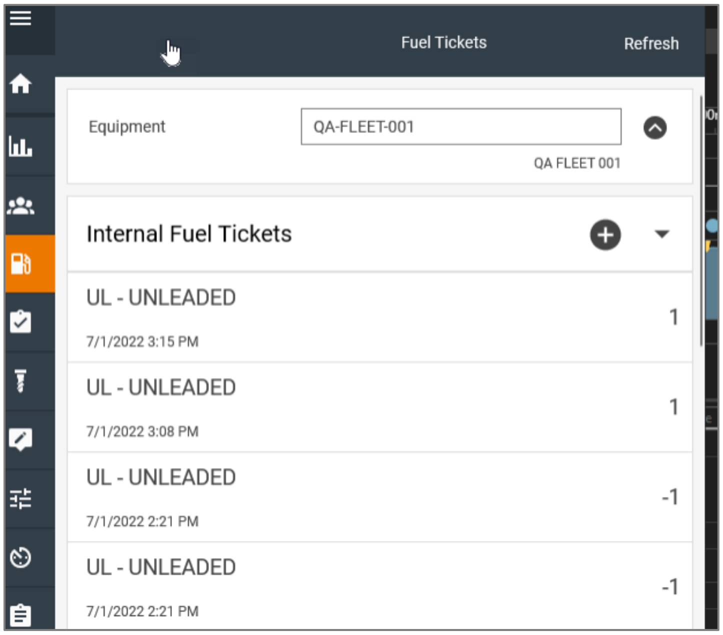
Fuel Tickets

The Fuel Tickets Portal allows you to track internal fuel transactions.



There are two pages in the Fuel Tickets portal: Fuel Tickets and Internal Fuel Tickets Details.

Fuel Tickets



The Fuel Tickets page shows an equipment choice-list with all active assets that are marked for Fuel Tickets under the Asset Primary Information > Authorization tab.

After selecting equipment, users are presented with a list of internal fuel tickets that are currently on the device.

Displayed fields include Fuel/Fluid Type - description, Tank Id, Transaction datetime, and Quantity.

Refresh button: Redownloads and refreshes internal fuel tickets for selected asset.

+ button: Creates a new Internal Fuel Ticket.

Users are presented with the Internal Fuel Tickets Details Popover after selecting existing fuel ticket or clicking **+** to add new.

Internal Fuel Tickets history is not downloaded by default. Users need to click **Refresh** after selecting an asset in order to see up to 100 of the most recent fuel tickets.

Internal Fuel Tickets Details

This popover contains the required and optional fields necessary to create internal fuel tickets and do fuel/fluid reversals. To simplify mobile workflow, only minimal required set of fields are displayed, and users will not see a lot of fields that are available in the web.

Displayed fields:

Equipment

Meter 1

Meter 1 Validation

Meter 2

Meter 2 Validation

Reversal

Site ID

Pump ID

Tank ID

Fuel/Fluid Type

Quantity

Error - If the server rejects the creation, it may be edited or deferred.

Data Download

Downloading supporting data for Fuel Tickets portal can be achieved by using the Fuel Tickets option in the download data page. The 'Refresh" button in the toolbar of the Fuel Tickets page will only perform download/refresh of Internal Fuel Tickets for selected assets, and not supporting data (Fuel Types, pumps etc.).

The download data page option will download the following endpoints:

Assets - With "Fuel Tickets" checkbox checked under "Authorization" tab

FuelFluidTanks (Active)

FuelTypes

FluidProductTypes

FuelingSites

FuelPumps

Inventory Count

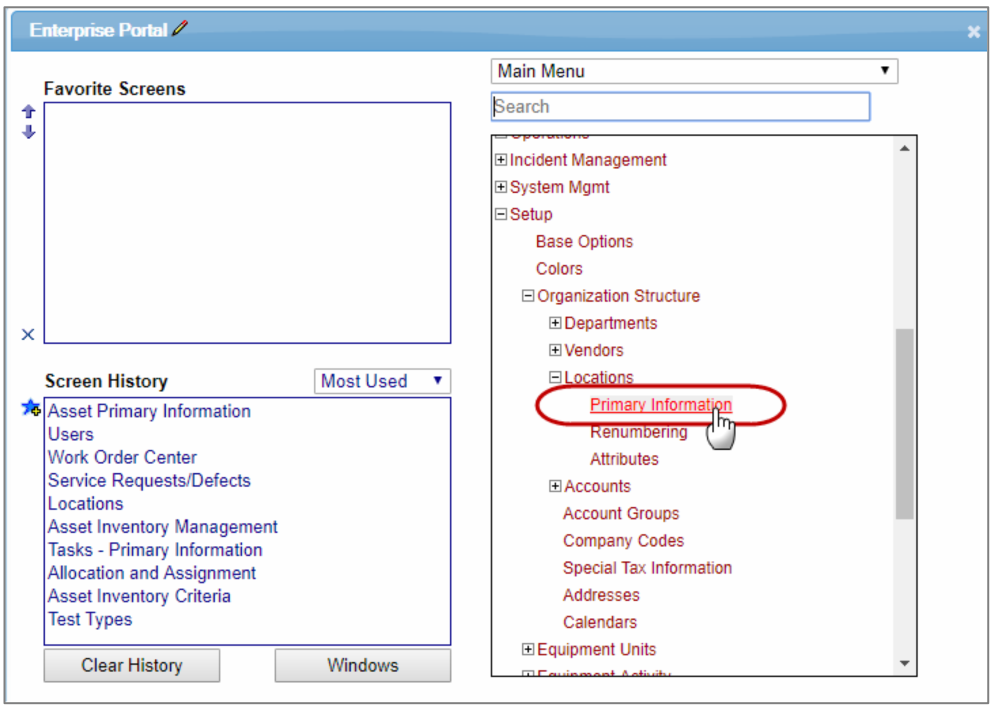
This portal is used for counting inventory in the current session location. Use this portal to perform cycle counts or record ad hoc counts when in the warehouse or storage location.

Requirements

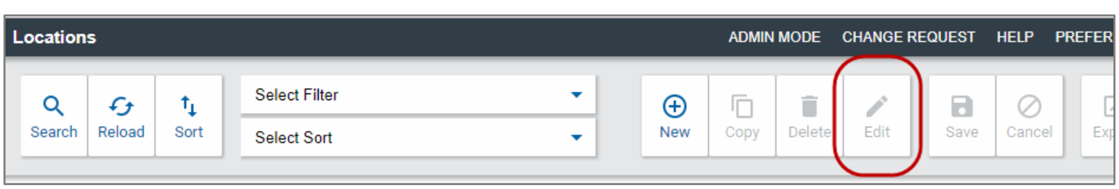
For this portal to work, an administrator must enable the option to allow the Inventory Count Management screens in the Enterprise Portal. For more information, refer to the help page for the Locations – Primary Information screen.

To turn on this requirement:

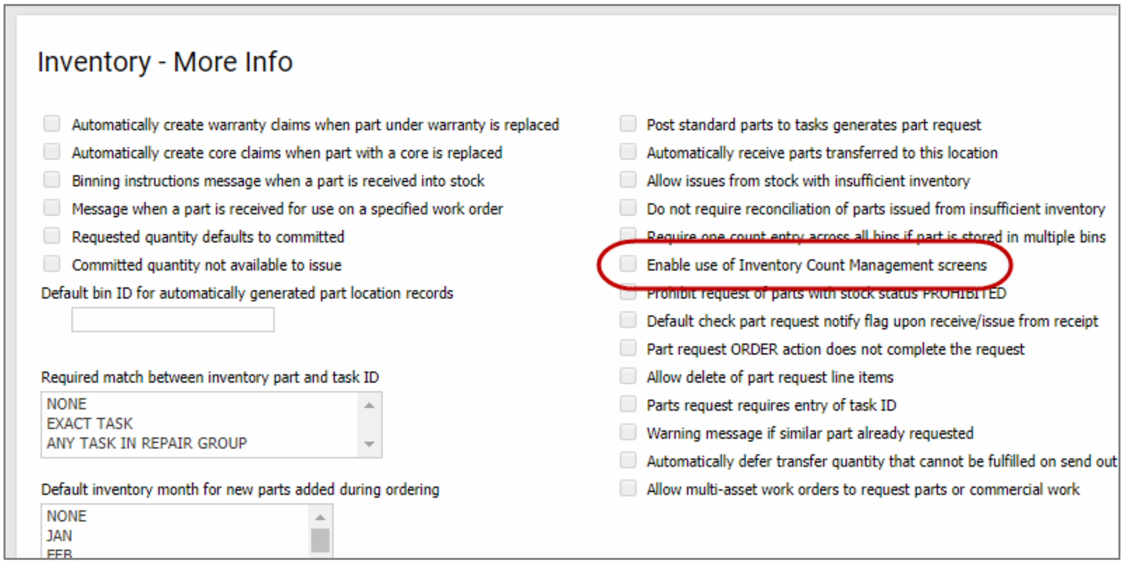
1. Open the Web Modules.
2. Open the Locations – Primary Information screen.



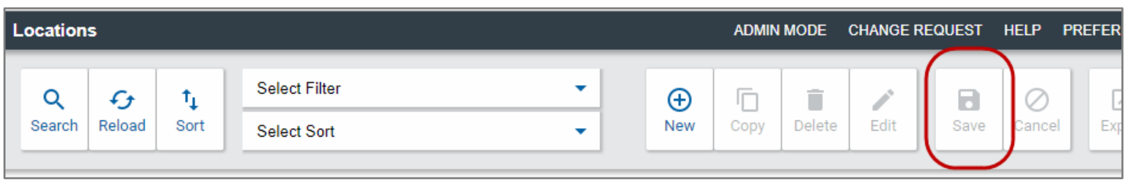
3. Search for, and select, your location record.
4. Click **Edit**.



5. On the Inventory – More Info tab, check the box for **Enable use of Inventory Count Management screens**.



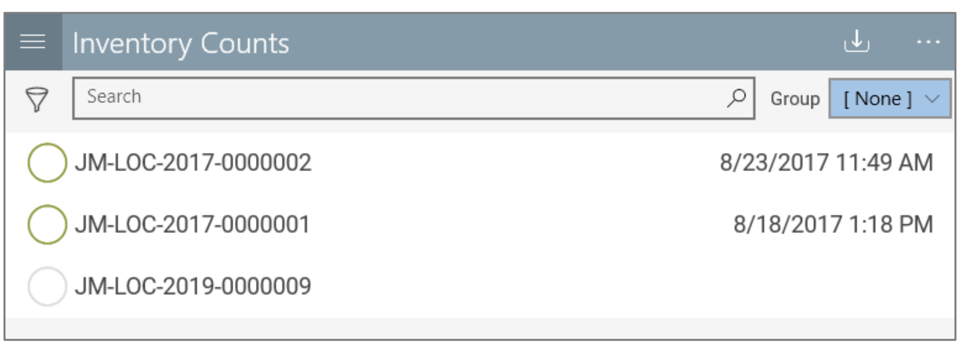
6. Click **Save**.



Inventory Counts List Page

When you first open the Inventory Count portal, the Inventory Counts main page displays. This page lists all of the inventory counts going on for the current session location. Use the **Group** drop-down list to filter results by Location, Status, or Bin.

Completed counts display with a green check mark. Incomplete counts, or counts that have not started have an open green circle.



To download count data:

Tap the Download icon to download inventory data. This downloads all inventory counts that have not been marked as **Completed**.

Other Inventory Count Data

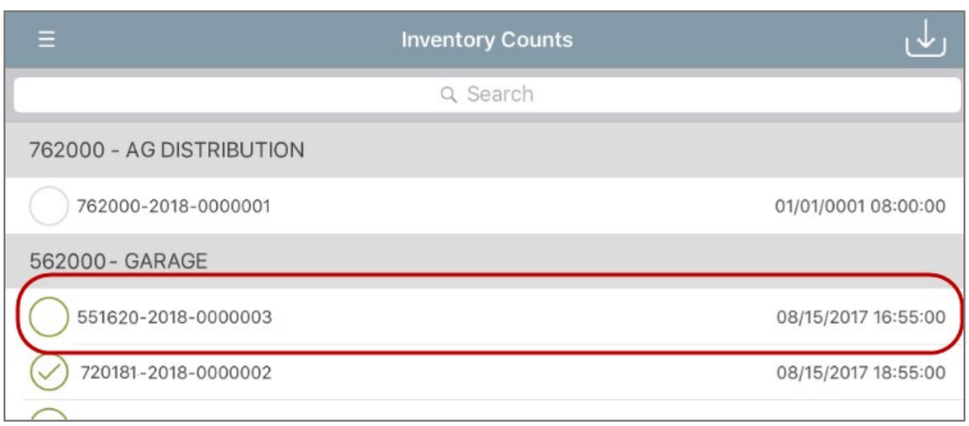
- Barcode scanning can be used in the Inventory County portal. Scan a barcode to find the count for that item. If no counts are found, you are prompted to choose a count, and then scan the part again to add an ad hoc count.
- Discrepancies must be handled through the Count Analysis screen to either adjust the count, or mark it for recount. Discrepancies display with a green check as the item has been counted, and will only show as a discrepancy in the Enterprise Portal screens, or in the Web Modules.
- Items needing recount are marked as though they have not been counted, as a green, open circle.

Viewing Count Details

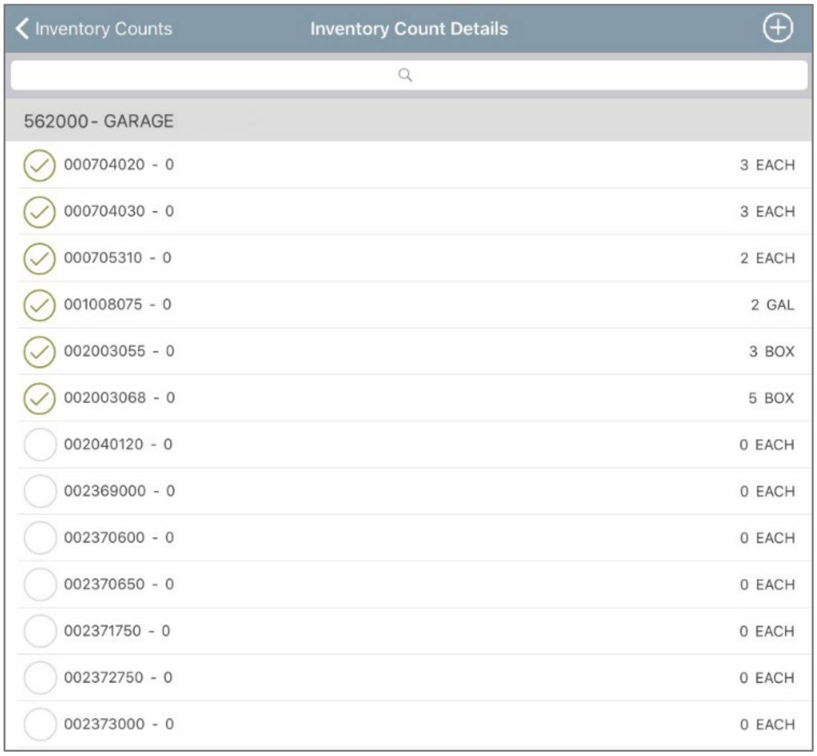
From the main Inventory Counts page, you can open each count to see details for that count.

To see detailed count information:

1. From the Inventory Counts page, tap an item line to see its details.

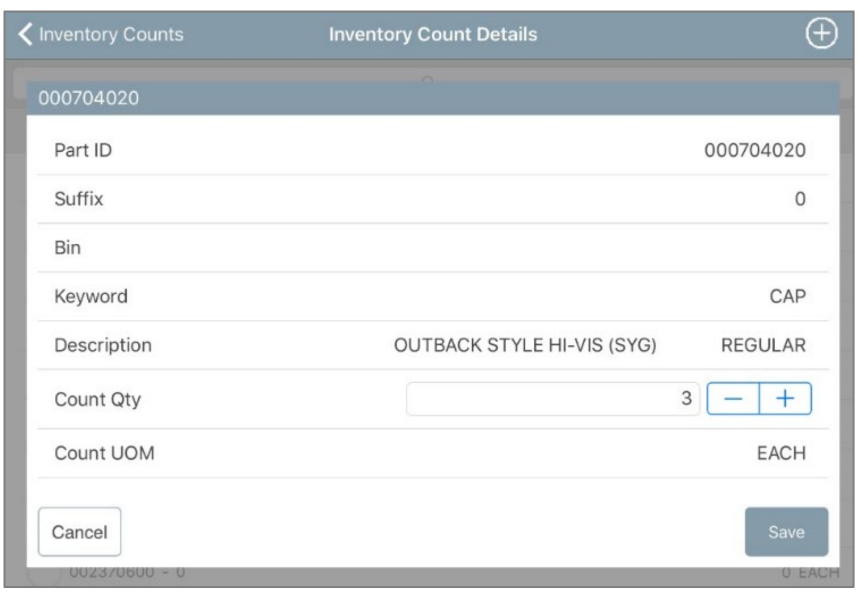


The Inventory Count Details screen displays. This page displays all items that need to be counted for the bin in that location. Completed items display a green check mark next to the item, and its count to the right.

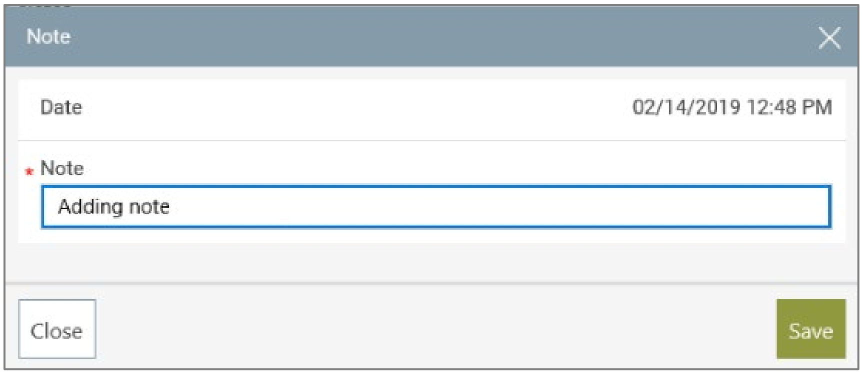


2. Tap a line to see detailed information.

   The part detail screen for that part displays.



3. Add notes or comments by entering them into the **Comments** field.



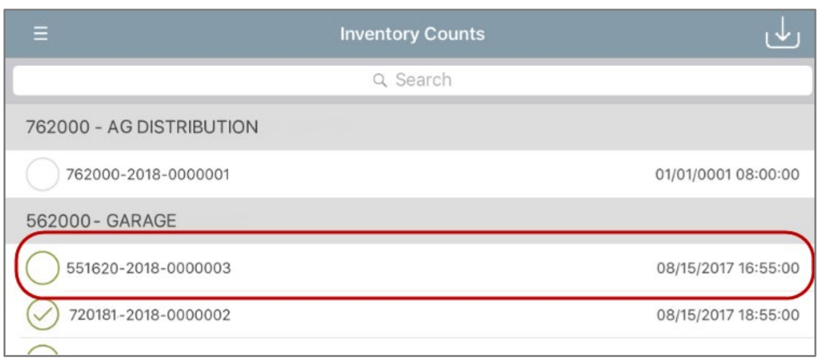
Entering Counts

From the main Inventory Counts page, open the counts to edit and track counts when taking inventory.

Original Inventory Count List

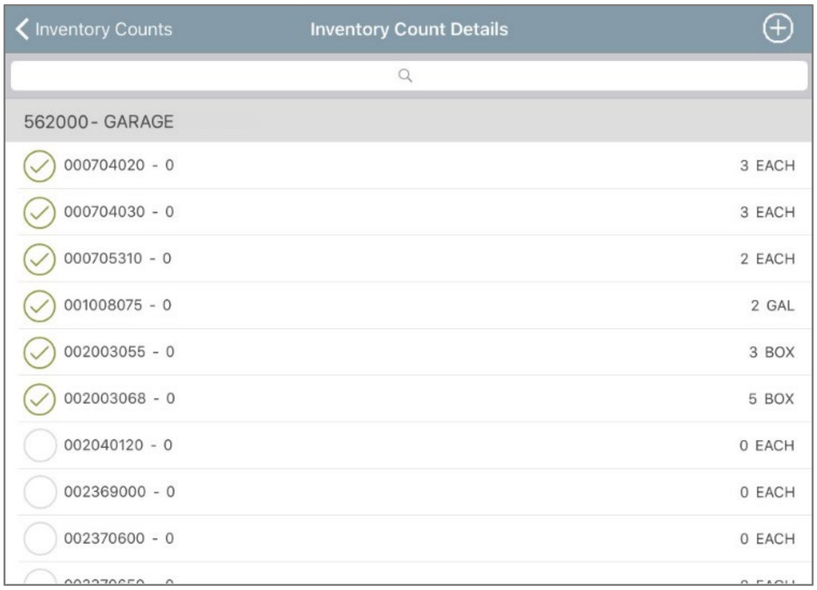
To edit count information:

1. From the Inventory Counts page, tap an item line to see open the count details.



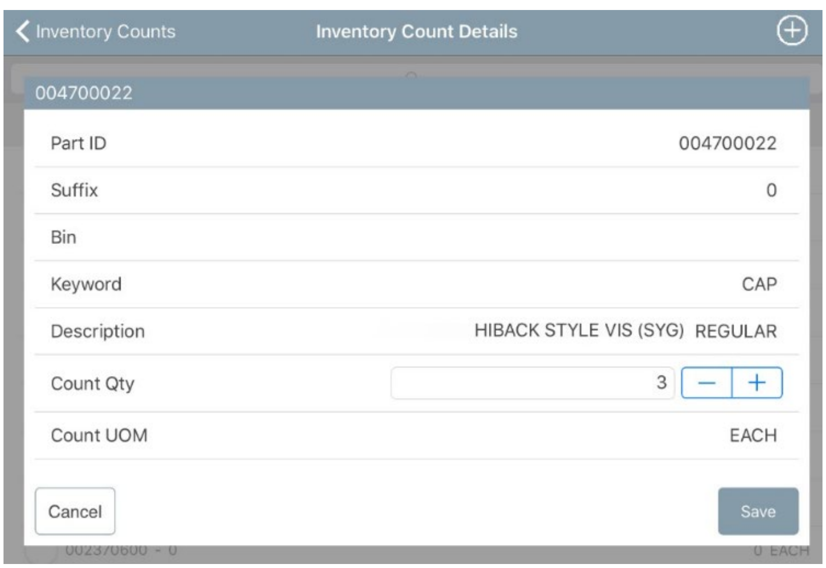
The Inventory Count Details screen displays. This page displays all items that need to be counted for the bin in that location. Completed items display a green check mark next to the item, and its count to the right.

Items can be edited until the entire count is complete, and has been updated in the server.



2. Tap a line to see detailed information.

   The part detail screen for that part displays.



3. Type a quantity, or tap the **+** or **–** buttons to add or subtract from the given number.
4. Tap **Save** to save the new information, or tap **Cancel** to exit without saving the new count.

Ad Hoc Counts

Use the Ad Hoc Count pop-in function to enter counts for items that may not be in the original inventory count list.

Note: To help keep track of multiple bins for ad hoc count items, enable the **Require one count entry across all bins if part is stored in multiple bins** option on the Locations – Primary Information screen, Inventory – More Info tab. If this option is enabled, when an ad hoc count is created, and that part has multiple bins, all bins are added to the inventory count to be completed.

For example:

- Part AB01 has parts in Bin 1 and Bin 2. If I create an ad hoc count for the part in Bin 1, Bin 2 is also added to the inventory count.

To add an ad hoc count:

1. From the Inventory Count Details page, tap the plus icon in the top-right corner.

The Ad Hoc Count pop-in displays.

2. Enter the information for the part.
   - **Part ID:** The ID of the part. Enter or choose the part ID from the choice-list.
   - **Suffix:** The part suffix.
   - **Bin:** The ID of the bin. Enter or choose the bin ID from the choice-list.
   - **Count Qty:** The count part quantity. Enter or tap **+** or **–**to change the quantity.
3. Tap **Save** to save the new count, or tap **Cancel** to exit without saving.

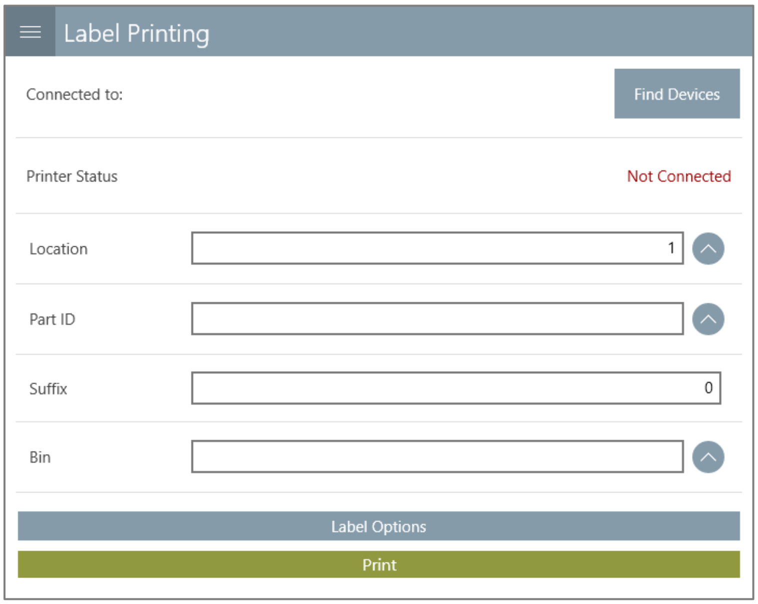
Label Printing

The Label Printing portal allows you to connect to select Zebra printers and print barcodes for locations, parts, and bins. You can customize the options to print just one or any combination of these pieces of information into a barcode.

Label Printing is not supported for devices using Windows platform.

To open the Label Printing portal:

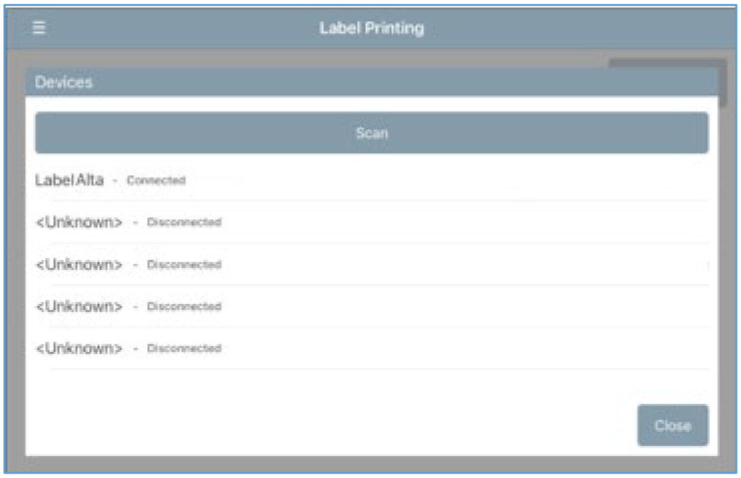
1. From the Dashboard or menu, tap the **Label Printing** icon.
2. The Label Printing portal displays.



Connecting a Device

To connect a device:

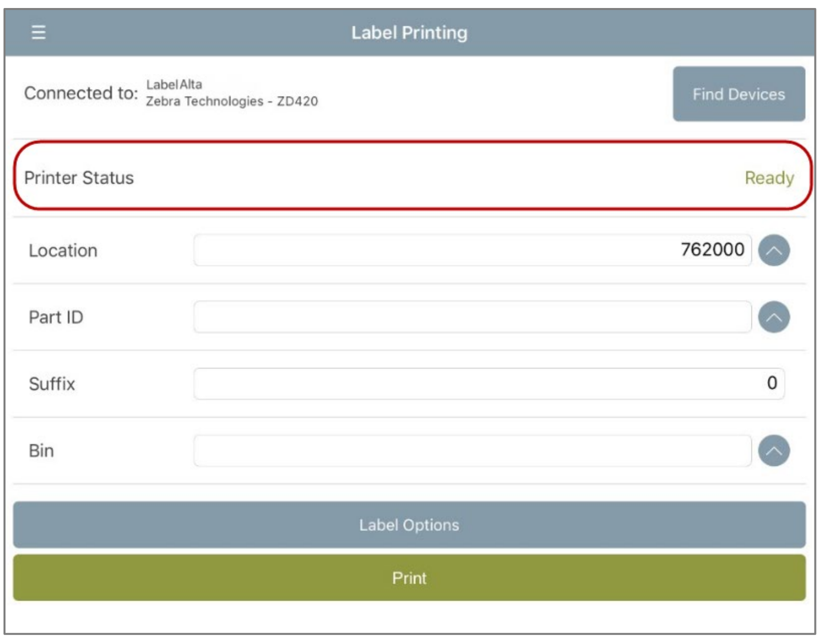
1. From the Label Printing portal, tap **Find Devices**.
2. The Devices pop-in displays.



3. If the correct device is not displaying, tap **Scan**.

4. Tap a listed device to select it.

   If the printer is available to connect to, the mobile device connects and shows that it is ready to print.

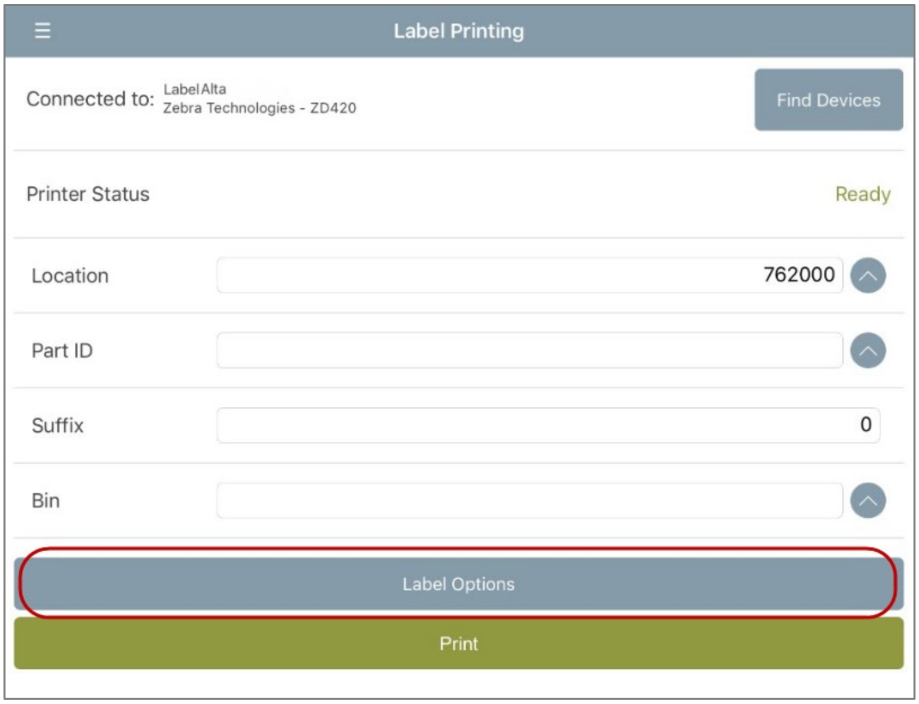


Setting Label Options

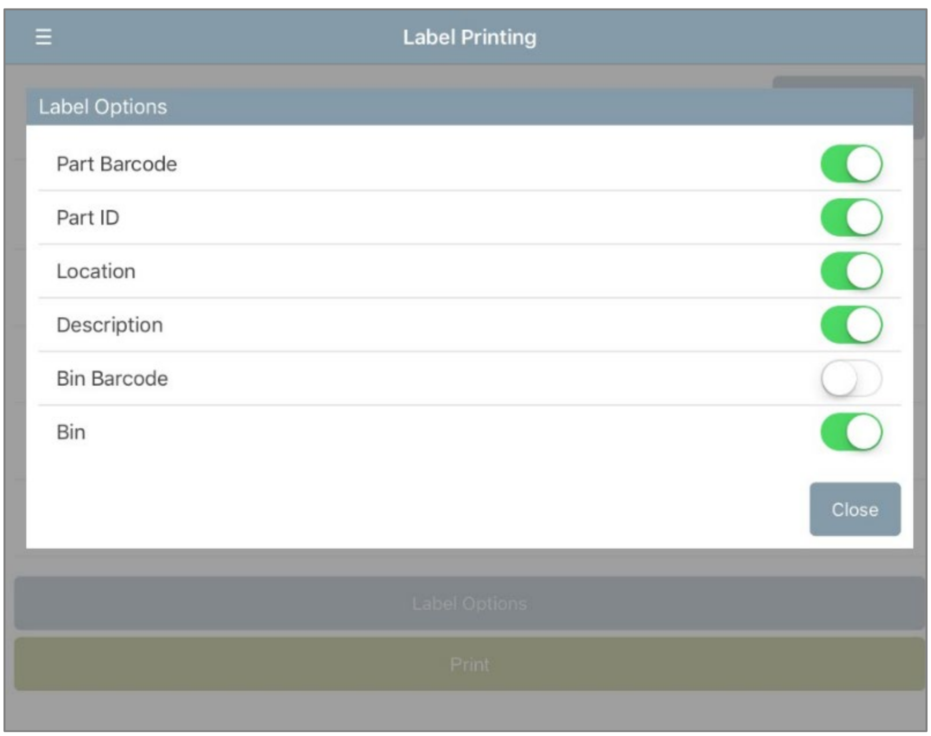
Configure the label options to choose how your label will look. Several options can be turned on or off, depending on what is needed for that label.

To configure label options:

1. From the Label Printing page, tap **Label Options**.



2. The Label Options pop-in displays.



3. Tap the sliders on the right to turn individual options on or off. Options available include Part Barcode, Part ID, Location, Description, Bin Barcode, and Bin.

4. When all the correct options are set, tap **Close**.

Printing a Label

Once all label options are configured, you can print the label.

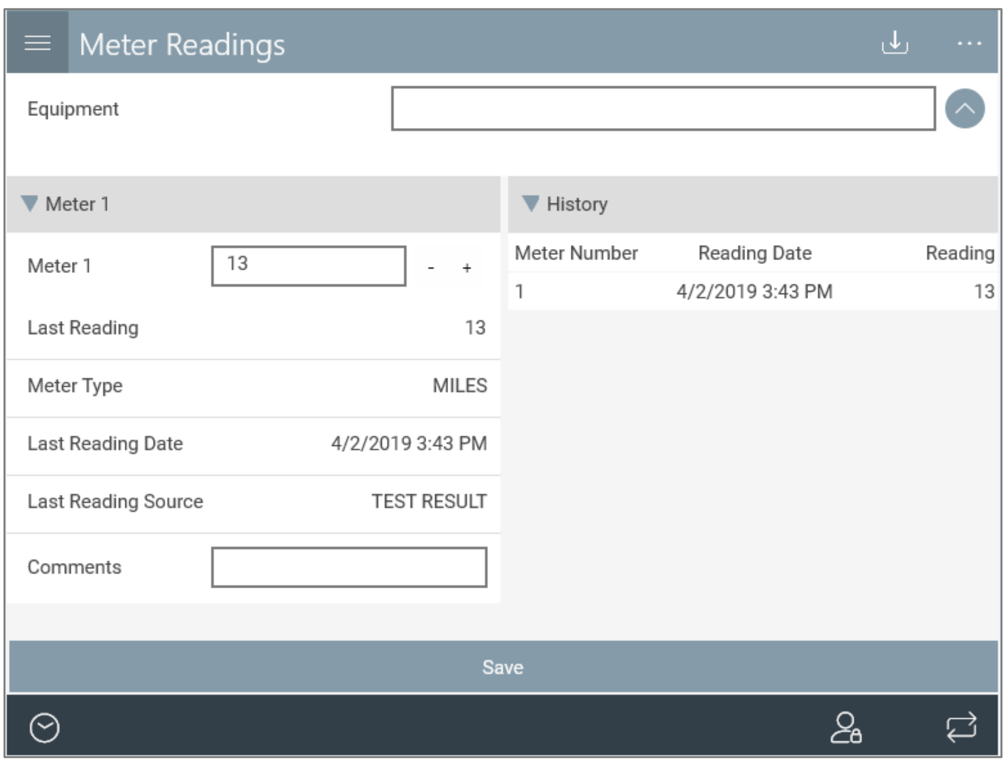
To print a label:

1. Make sure your device is connected to a printer. Refer to the
2. Connecting a Device section for more information.
3. Set the **Location**, **Part ID**, **Suffix**, and **Bin** fields.
4. Set Label Options. Refer to the Setting Label Options section for more information.
5. Tap **Print**.

   The label prints.

Meter Readings

Use this portal to update the meter reading for an asset.



The equipment choice list is filtered by any asset that has a Meter 1 and/or Meter 2, is active in the system, and is not a template.

To update the meter reading:

1. Select equipment.

   Meter 1 and/or 2 details including Last Reading, Meter Type, Last Reading Date, and Source will display. History for the specified meter will also display.

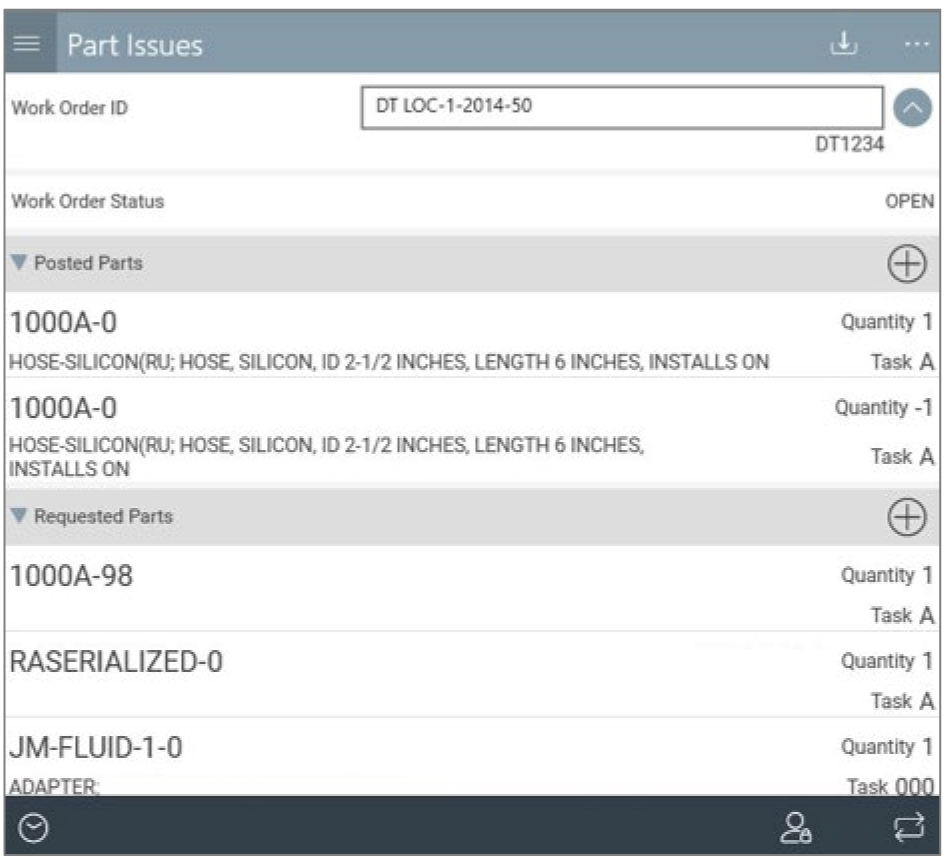
2. Edit the Meter value by clicking the + icon or entering the value. Meter values must be greater than or equal to the last meter value.

3. Enter **Comments** if desired.

4. Click **Save**.

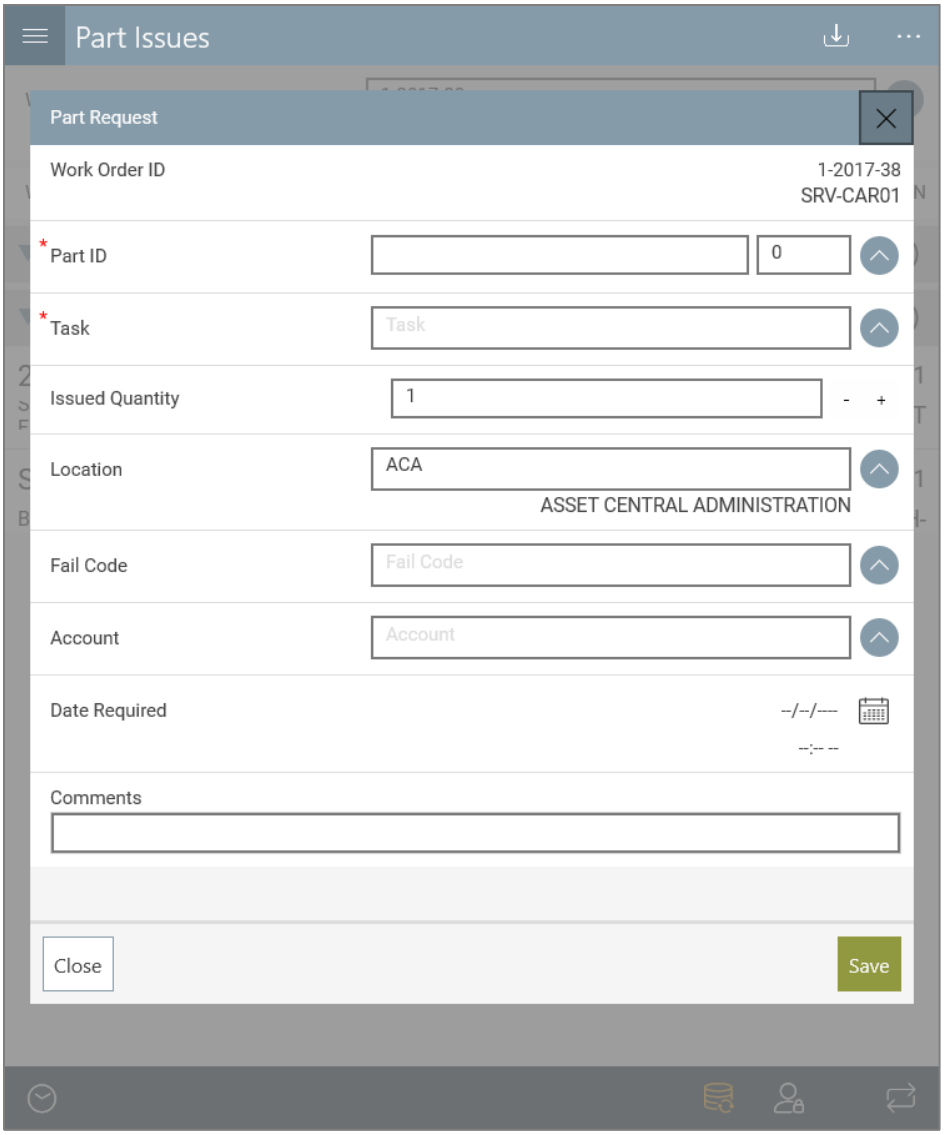
Parts Issues

When you are working in the field, EAM Mobile offers some capabilities for issuing and returning parts in the field. This is generally used for parts that are carried in mobile stores in a maintenance worker's truck, or for not-from-inventory (NFI) parts which are purchased while in the field using a P-card or other purchasing tools.



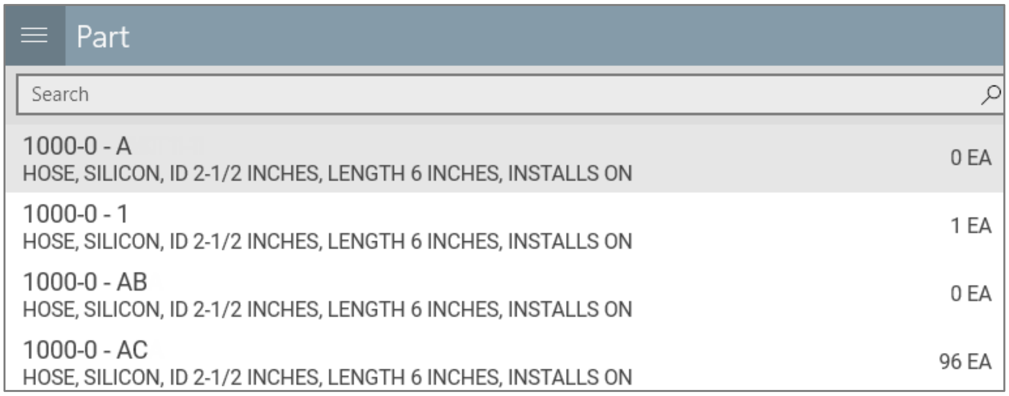
Part Requests

To request a part, tap the + button to open the Part Request pop-in.



Enter the part information including Part ID, Task, Issued Quantity, Location, Fail Code, Account, Date Required, and any Comments you want to add.

When adding parts, the Part choice-list displays when you click the arrow next to the field. Parts display according to items available at the location the user is signed in under. The quantity available, and the unit of measure display to the right of the name and description of the part.



Pick Lists

Tap the Pick List portal icon from the Dashboard or the menu to open the portal.

Pick list cards are categorized into two categories:

- **Pending:** Cards that have had no movements.
- **In-Progress:** Cards that have had movements.

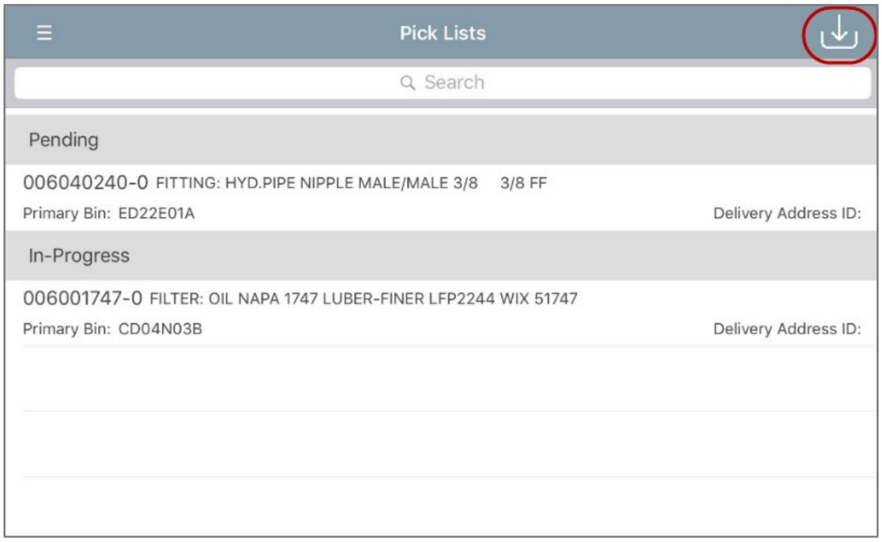
Note: Since picking cards do not necessarily have a final staging bin, there is no complete category.

Cards are sorted by delivery address ID, and then by primary bin.

Downloading Pick Lists

To download pick lists:

1. Open the Pick List portal.
2. Tap the download icon in the top-right corner.



Searching Pick Lists

Use the Search bar to search for a specific pick list. This will search all part IDs, default stock bins, current bins, and the delivery address ID.

The search bar is also a barcode scanner enabled for any part or bin being scanned.

For bins:

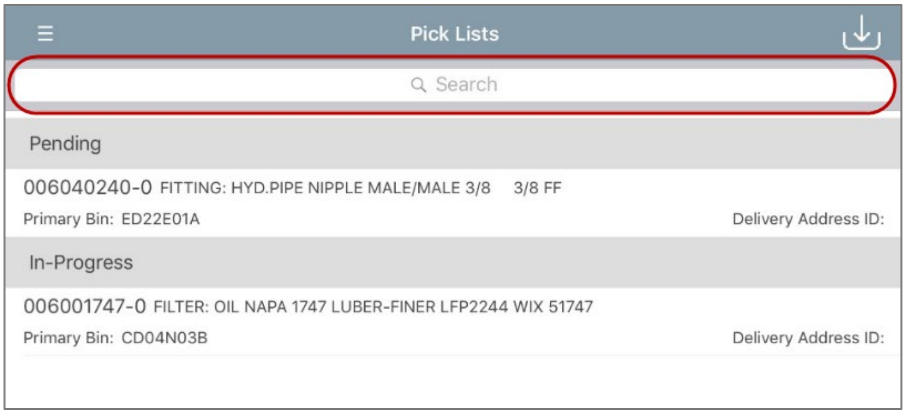
- Scanning a bin will add the bin ID to the search to filter the results.

For parts:

- If there is only one part in all of the cards that matches, it will automatically open that card.
- If there are multiple parts, it will enter that part ID and suffix into the search bar to help filter the results.

To search for a card:

1. On the Pick List page, tap in the Search bar.



2. Type your search.

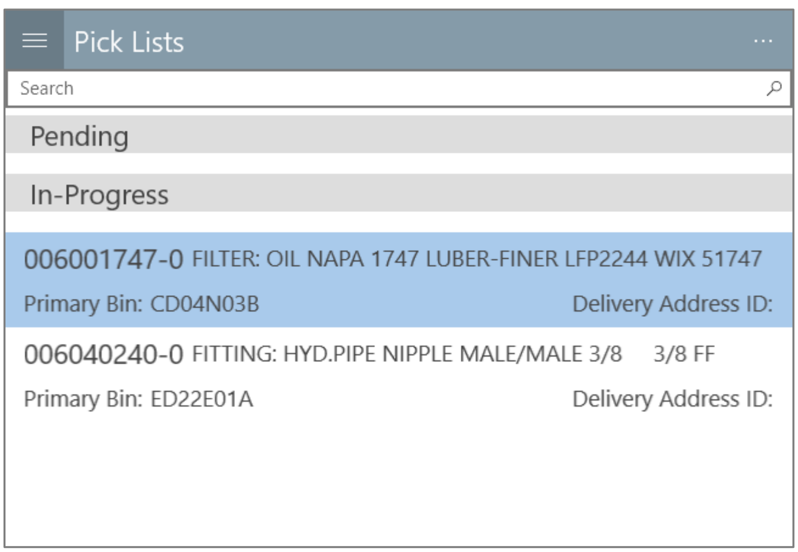
   The list of items will narrow down as you type an entry.

Moving an Item

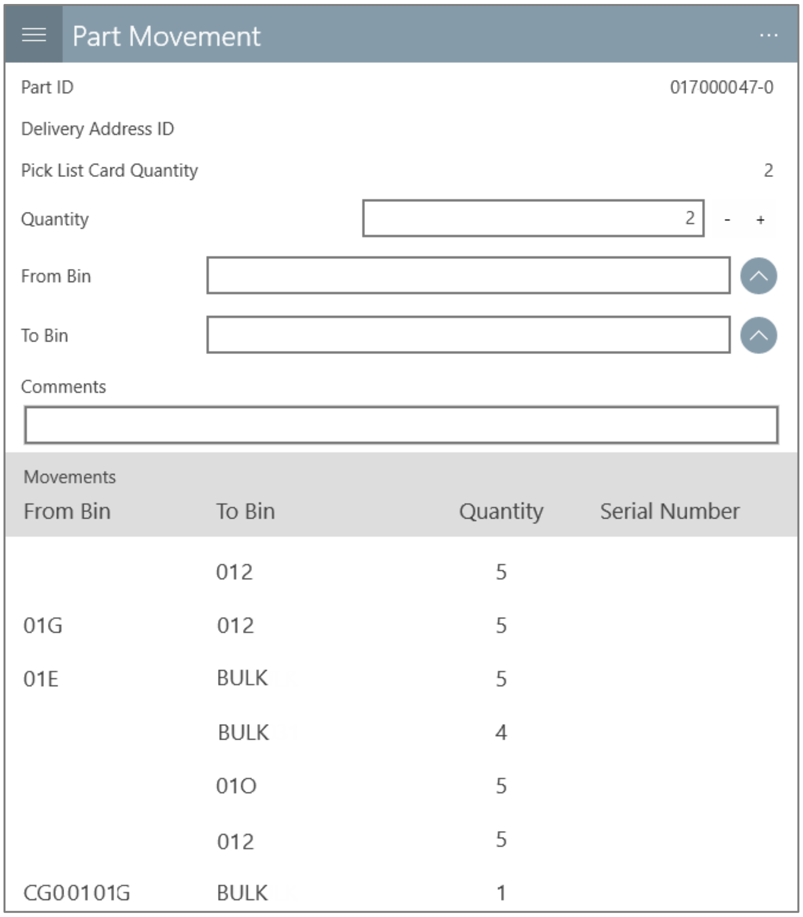
To move an item:

1. From the Dashboard or menu, tap **Pick Lists**.

   The Pick Lists page displays.



2. Tap an item to open the Part Movement page



This page displays the following information when selecting a card from the pick list:

- **Part ID:** The part ID and the suffix
- **Delivery Address:** The ID associated with the location where the part is going.
- **Pick List Card Quantity:** The total amount of the items to move on the card.
- **Movements table:** This table displays previous movements for the card.

3. Enter the rest of the information for the part movement.

Note: Barcode scanners can be used to scan values, such as bin IDs, into these fields. When scanning bins, the scanner will enter the scanned value into the first open Bin field. If both bins already have an entered valued, a message displays that a field must be cleared before rescanning the item.

Note: The choice-list screens for bin selection displays all staging bins, and any stocking bins that have been marked in the Parts – Location Information screen for the part being moved.

- **Serial Number:** The serial number to move (if the part is serialized). This field will not display if the item is not serialized. This field has a choice-list for all serial numbers associated with the part. When scanning a generic part (not in the web asset management system), the scanner enters the barcode value directly into the serial number field. If you are adding a new serial number that does not exist yet on this card, it will automatically be added to the card for you when you tap **Submit**.

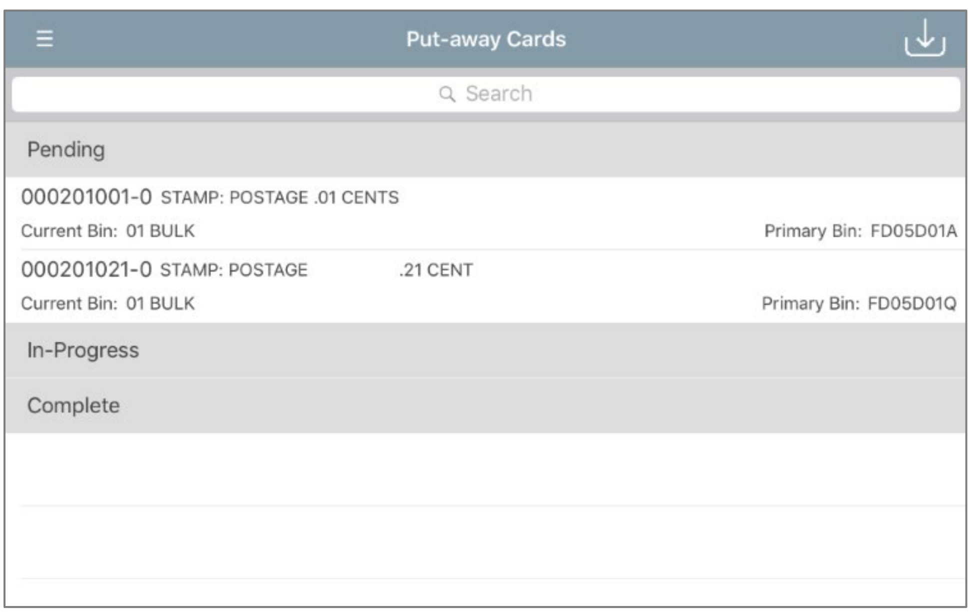
- **Quantity:** The number amount of the part that is going to be moved.
- **From Bin:** The ID of the Bin the part is moving from. This will default to the previous bin if it is not serialized, and each movement that has already been done on this card has moved the entire pick list quantity. Enter or choose the bin with the choice-list.
- **To Bin:** Enter the bin ID of the bin the part is moving to. Enter or choose the bin with the choice-list.
- **Comments:** Enter any comments about the move. This field is optional.

4. Once all information is complete, tap **Submit**.

   The movement displays in the Movements table.

Put-away Cards

This portal allows you to move parts associated with put-away cards in the current session location.



Put-away Card Information

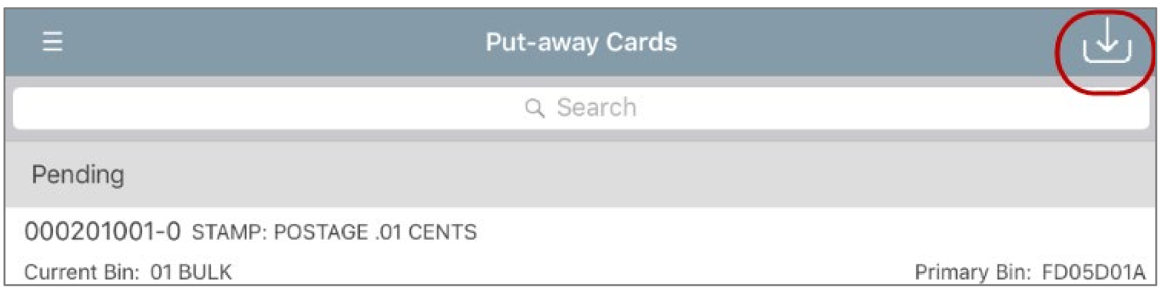
- Cards are sorted alphabetically by their primary bin, and then by their current bin.

- Put-away cards are separated into three categories:
    - **Pending:** These are cards that have not yet been moved from their initial staging location.
    - **In-Progress:** There have been movements done on the card, but the last movement was not into the default stock bin for that part.
    - **Complete:** This status is assigned if the last movement was into a default stock bin for the part, and assumes it has been put away properly. Items are not removed from the device unless they have been marked as Approved on the server (which cannot be done from the device).

Downloading Put-away Cards

To download put-away cards:

1. Open the Put-away Card portal.
2. Tap the download icon in the top-right corner.



The pick lists are downloaded.

Searching Put-away Cards

Use the search bar to look for a specific card. Search is real time, and filters the list as you type in a search. The search field searches all part IDs, descriptions, default stock bins, current bins, and put-away card IDs.

To search for a put-away card:

1. In the Put-away Cards page, tap in the **Search** bar.
2. Search by typing, or by scanning in a barcode.
    - Type your search into the bar.

      The list of put-away cards will filter down as you type.
    - Scan an item with a barcode (part ID, bin ID, etc.).

For bins:

- Scanning a bin will add the bin ID to the search to filter the results.

For parts:

- If there is only one part in all of the cards that matches, it will automatically open that card.
- If there are multiple parts, it will enter that part ID and suffix into the search bar to help filter the results.

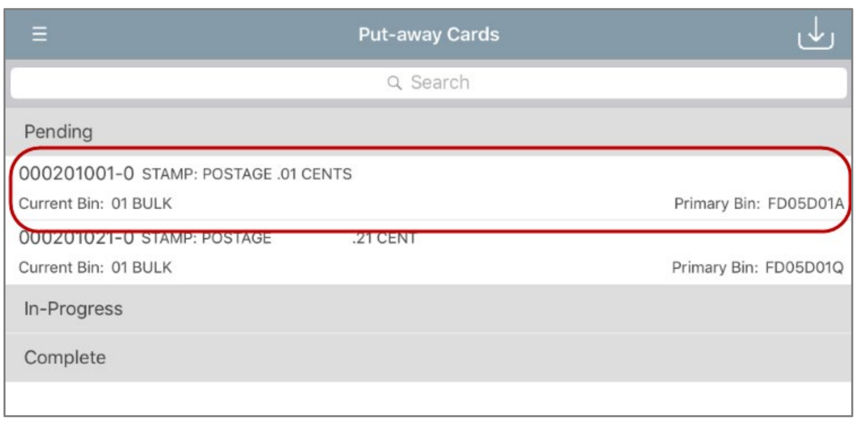
Moving an Item

To view put-away card details:

1. From the Dashboard or menu, tap **Put-away Cards**.

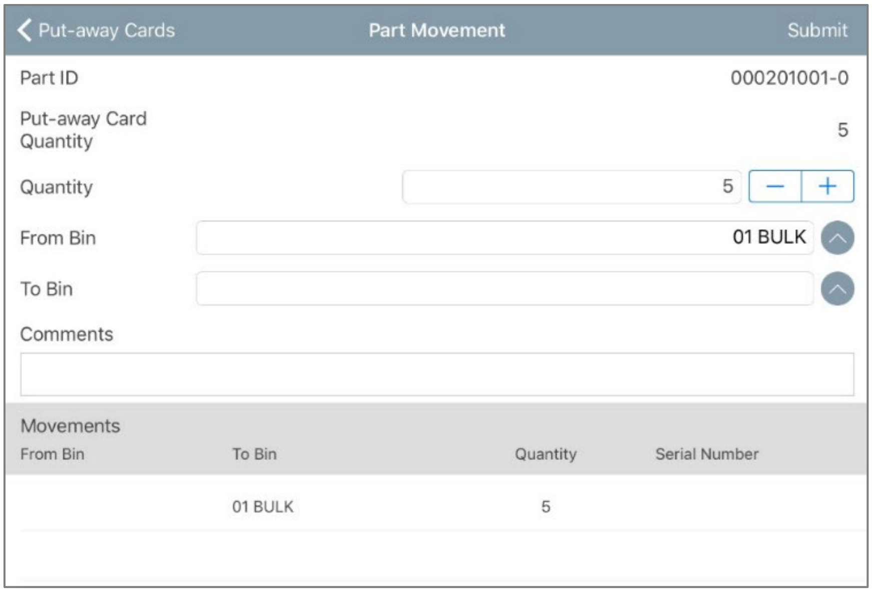
   The Put-away Cards page displays.

2. Tap a line item.



   The Part Movement page displays. The following information is displayed when choosing a line item.

   - **Part ID:** The ID of the part. This includes the part ID and the suffix.
   - **Put-away Card Quantity:** The total amount of the part on the card.
   - **Movements table:** This table displays previous movements for the card.



3. Enter the rest of the information for the part movement.

Note: Barcode scanners can be used to scan values, such as bin IDs, into these fields. When scanning bins, the scanner will enter the scanned value into the first open Bin field. If both bins already have an entered valued, a message displays that a field must be cleared before rescanning the item.

Note: The choice-list screens for bin selection displays all staging bins, and any stocking bins that have been marked in the Parts – Location Information screen for the part being moved.

- **Serial Number:** The serial number to move (if the part is serialized). This field will not display if the item is not serialized. This field has a choice-list for all serial numbers associated with the part. When scanning a generic part (not in the web asset management system), the scanner enters the barcode value directly into the serial number field.

  Note: Use the context menu options on the Serial Numbers to access the **Delete** option.

- **Quantity:** The number amount of the part that is going to be moved.
- **From Bin:** The ID of the Bin the part is moving from. This will default to the previous bin if it is not serialized, and each movement that has already been done on this card has moved the entire pick list quantity. Enter or choose the bin with the choice-list.
- **To Bin:** Enter the bin ID of the bin the part is moving to. Enter or choose the bin with the choice-list.
- **Comments:** Enter any comments about the move. This field is optional.

4. Once all information is complete, in the top-right corner, tap **Submit** (or tap the see more info button and then tap **Submit**).

   The movement displays in the Movements table.

Service Requests

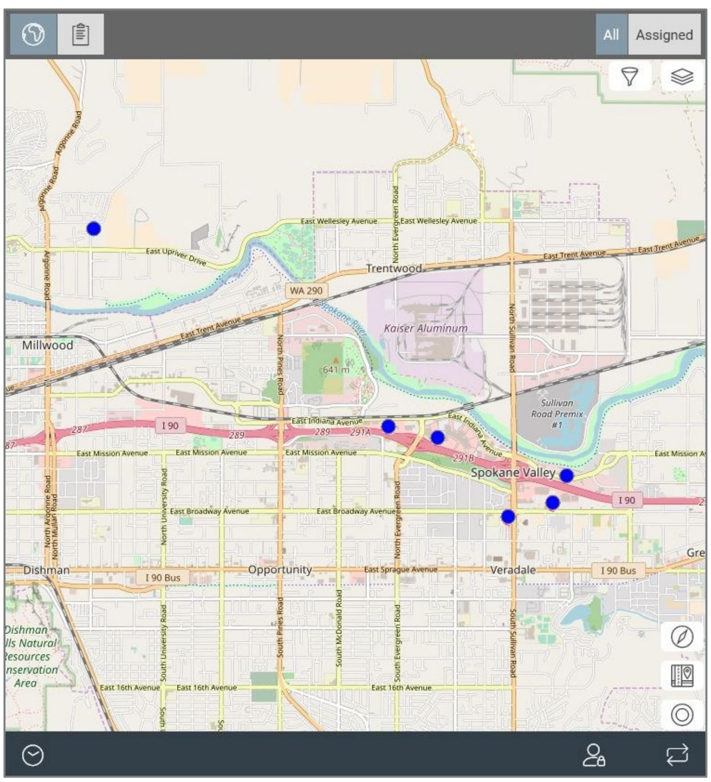
This portal opens the service request functions available within EAM Mobile. The Service Request Screen displays the service request input form and enables you to create a new service request for an asset while in the field. Service requests created in the field can only be created for specific assets. Assets can also be searched for by Asset Number.

Viewing the Portal

Data can be viewed in Map or List view.

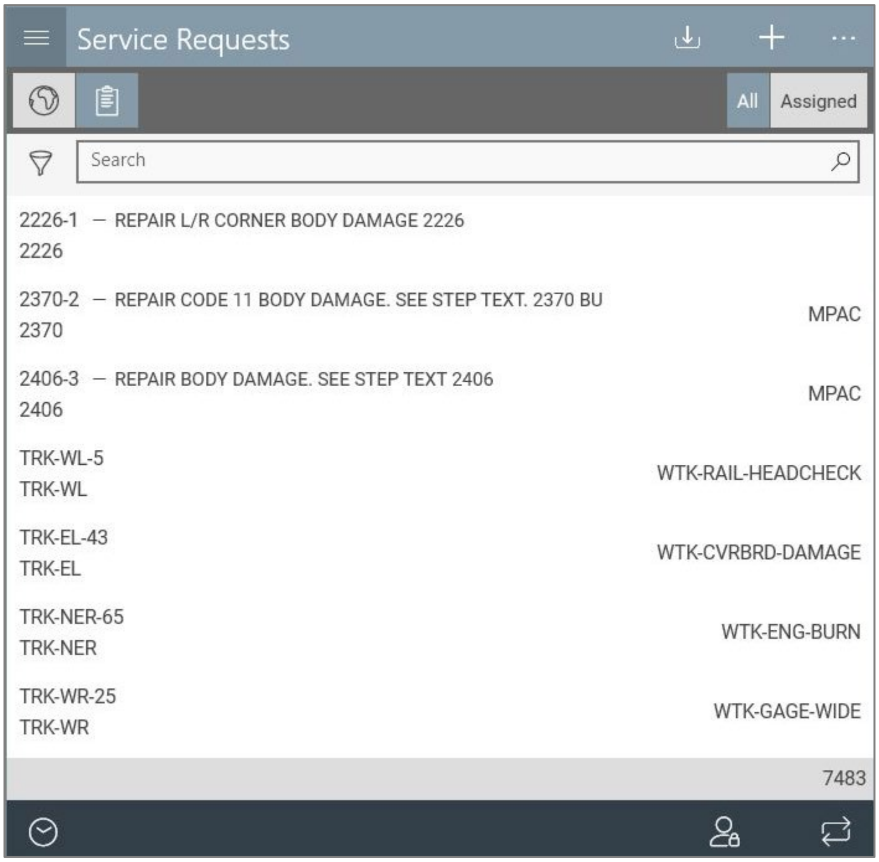
Map View

If configured for mapping, the Map View displays service requests and assets on a map. Clicking the service request dot or the asset icon will take you to the Service Request Details or Asset Details page.



List View

The List View displays work orders and assets in a sortable and filterable list. Clicking on a service request record will take you to the Service Request Details page.



Service Request Details Page

The service request detail page displays basic information and status of the service request, as well as Tasks, Notes, and Files. With the exception of Tasks, each section will only display if it contains items. Each section header has a + button that can be used to add an item. Only pending service requests will show in this portal.

Tasks Section

Tapping a task will take you to the Task Details page. A task cannot be removed via mobile once it has been created.

Notes Section

Click the + button to add a note to the service request. A note cannot be deleted once it is created. Selecting a note will display a pop-in containing additional information about the note.

Files Section

Files can be removed and renamed in the Files section. A thumbnail for a file is shown on the left. If a file is not an image type, then a generic document icon is displayed. Due to memory issues on Android, image thumbnails are not shown, and instead the generic document icon is used. Tapping on a file will open it externally if in Windows or open in a pop-in if using iOS or Android.

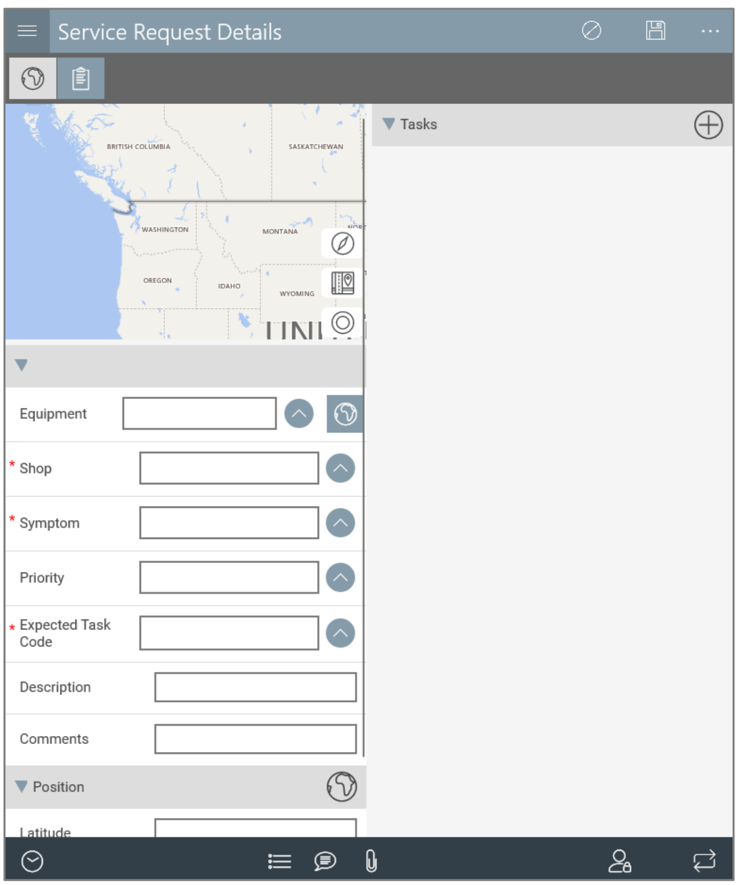
Creating a Service Request

After initial login and data download, all data necessary to create a new service request is available.

To create a service request:

1. Tap the + icon in the toolbar.

   The Service Request Details page displays.

2. Complete the fields for your service request.

   - A Shop, and Symptom or Task Code are required for a new service request.

For the Symptoms choice-list, if there is no asset selected for the service request, only symptoms that support no asset display.

- A position can be set by clicking the Globe icon in the Position section header.
- If mapping is licensed, aside from manually entering or searching for equipment, you can select the needed asset from the map.

3. Click the icon to add the service request.

If the server rejects the newly created service request, it may be edited or deferred. If deferred, any additional items created that reference this work order will also fail and will need to be deferred.

Reviewing or Editing a Service Request

From the Service Request Details page, click the Edit button. This will enter the work order into edit mode where most fields can be edited.

The icon bar on the bottom of the Service Request Details page allows you to complete additional functions as explained in the table below. Clicking on the corresponding icon will launch the pages for that workflow.

Icon	Description
	Add Task
	New Note
	Attachments

Test Results

The Test Results portal allows you to enter test results in the field while away from your network. It can be used to view, edit, or add new test results. This portal can be hidden, but users will still be able to access tests on work orders.

Creating a New Test Result

1. Click the Add button in the toolbar.

   The Test Results Detail page will display in create mode.

2. Select an Equipment ID and Test Type.

   If this page was accessed via the Work Order Details Page, the Work Order ID and Equipment fields will be pre-selected and read-only.

Performing a Test

A test usually contains one or more test elements, which must have any required fields completed before a test can be performed.

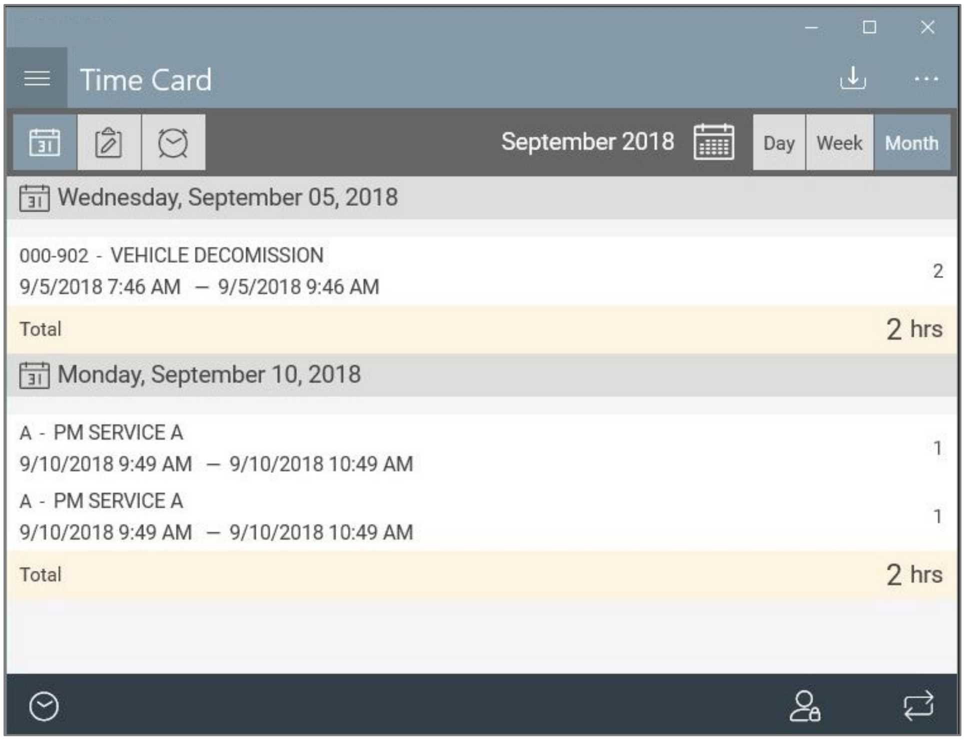
When a test element has been modified, a pencil icon displays. To reduce network/server load, only elements that have been modified will be sent to the server when the save button is clicked.

Viewing a Test Result

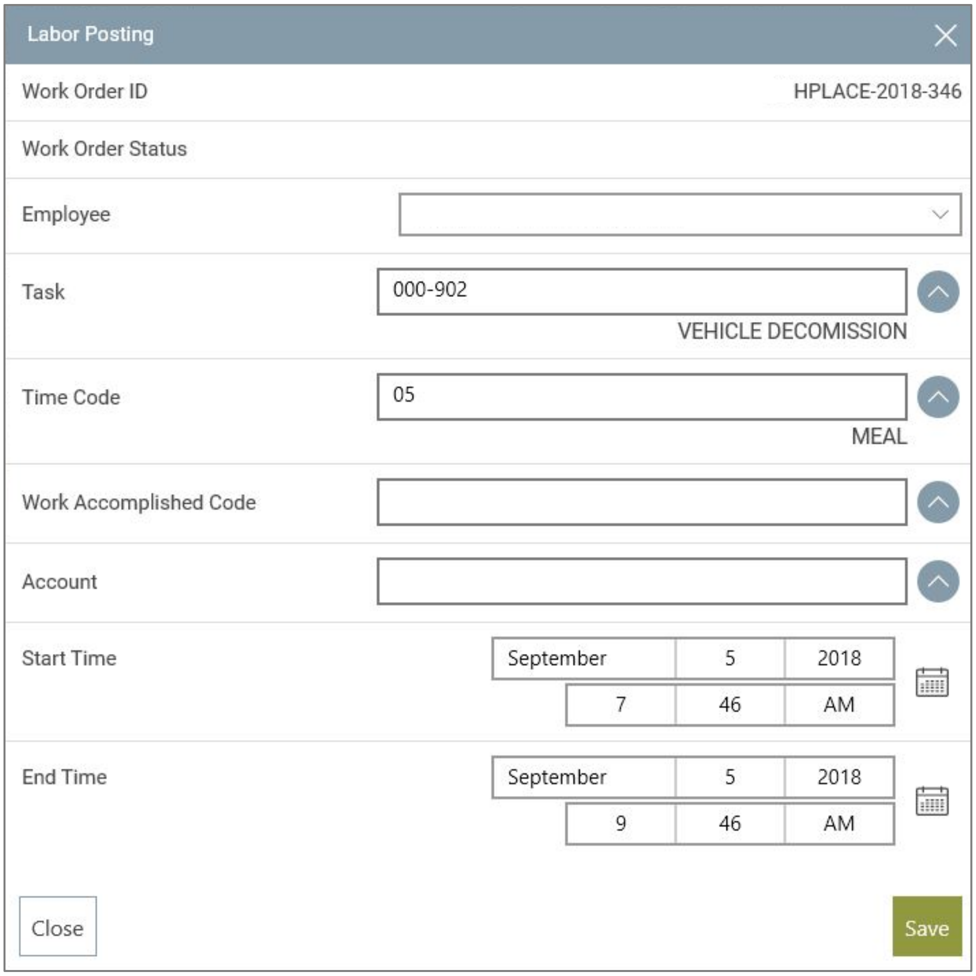
When viewing a test result, your mobile device will indicate if the test has been completed with a **Completed** flag. This flag maps to the **Closed** check box on Test Results screen in Enterprise Portal where it can be used to close test results.

Time Card

Use the Time Card portal to view, modify, and reverse labor. If this portal is accessed from the Crew Management portal, the selected employee information will be displayed along the top, as well as the task to which the employee is jobbed-on.



Labor can be grouped by day, time code or work order. Day, week, and month time ranges may be selected to filter labor.



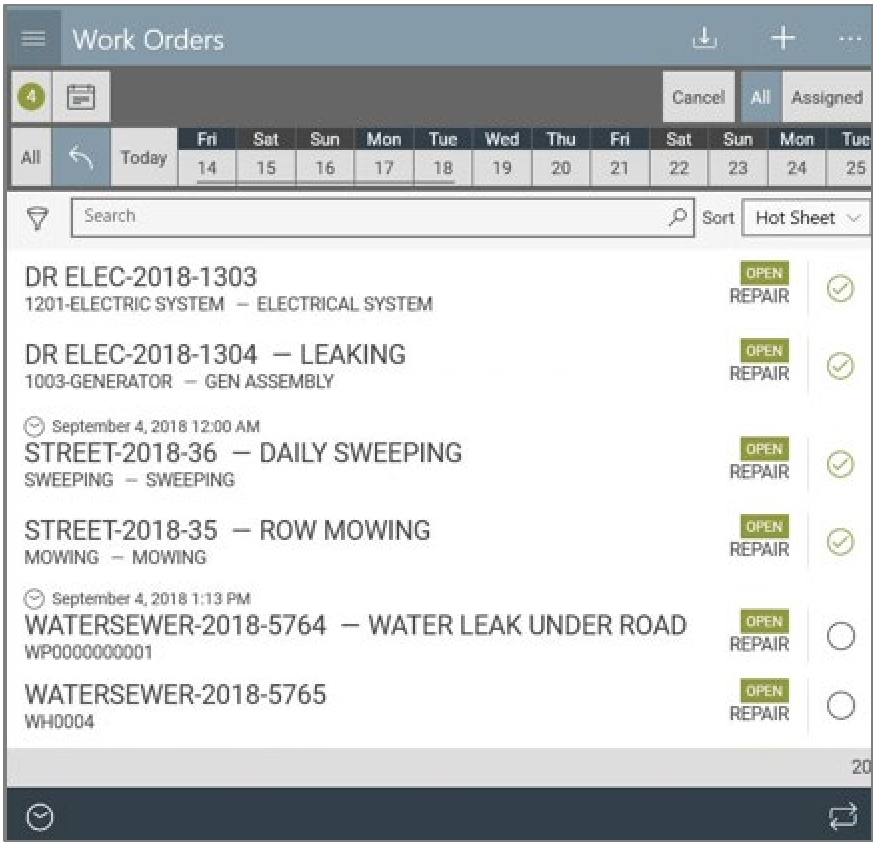
Work Orders

The Work Orders portal allows you to use work order functions including the ability to create new work orders, edit existing work orders, work with part requests and issues, manage assets and crews, and work with service requests. This portal also displays a visual representation of all, or your assigned work and tasks using mapping. Assets can also be searched for by Asset Number.

Viewing the Portal

Data can be viewed in Schedule, Map, or List view.

Schedule View



The Schedule view displays work orders and assets in a sortable and filterable list, with a day-selection bar to filter for what is scheduled on a given day. The ↰ (back arrow) button shows work orders that are past due or unscheduled.

The sorts available for work orders include the following: Hot Sheet, Work Order, Priority, Delay Status, and Service Status.

Note: Hot sheet sorting is set up in the Location Settings Profiles in the main web portals.

To reschedule a work order:

1. Tap **Edit** in the main header.

   The view will change to reschedule mode and allow for multi-selection of work orders in the list.

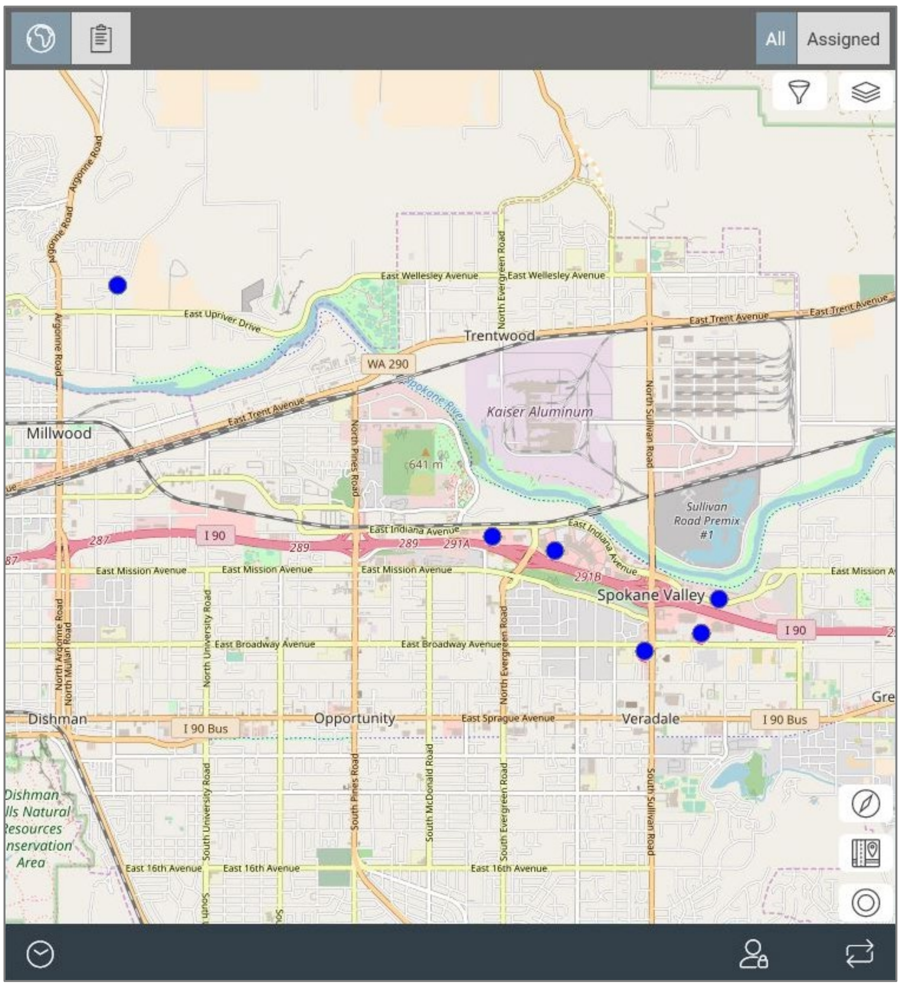
2. Select work orders and click the calendar icon.

A pop-in will display with option for what day and which employee to assign.

- If you move to a different day, you see a highlight on the top bar for the day and it moves from backlog to the current day.
- If you move to a different person, it removes you from the current queue.

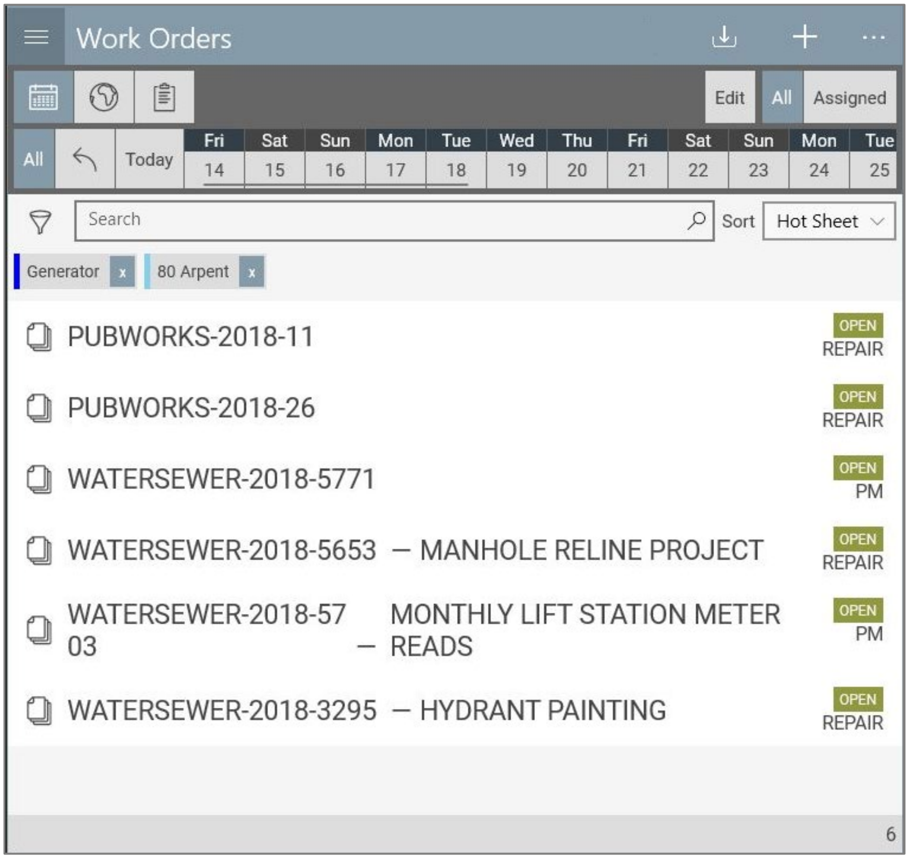
Map View

If configured for mapping, the Map View displays work orders and assets on a map, with a day selection bar shown to filter on what is scheduled for a given day.



Clicking a pin will take you to the Work Order Details page for that work order. Linear assets can be edited by clicking a pin for a work order, then clicking on the linear asset to adjust the from/to and marker/offset.

List View

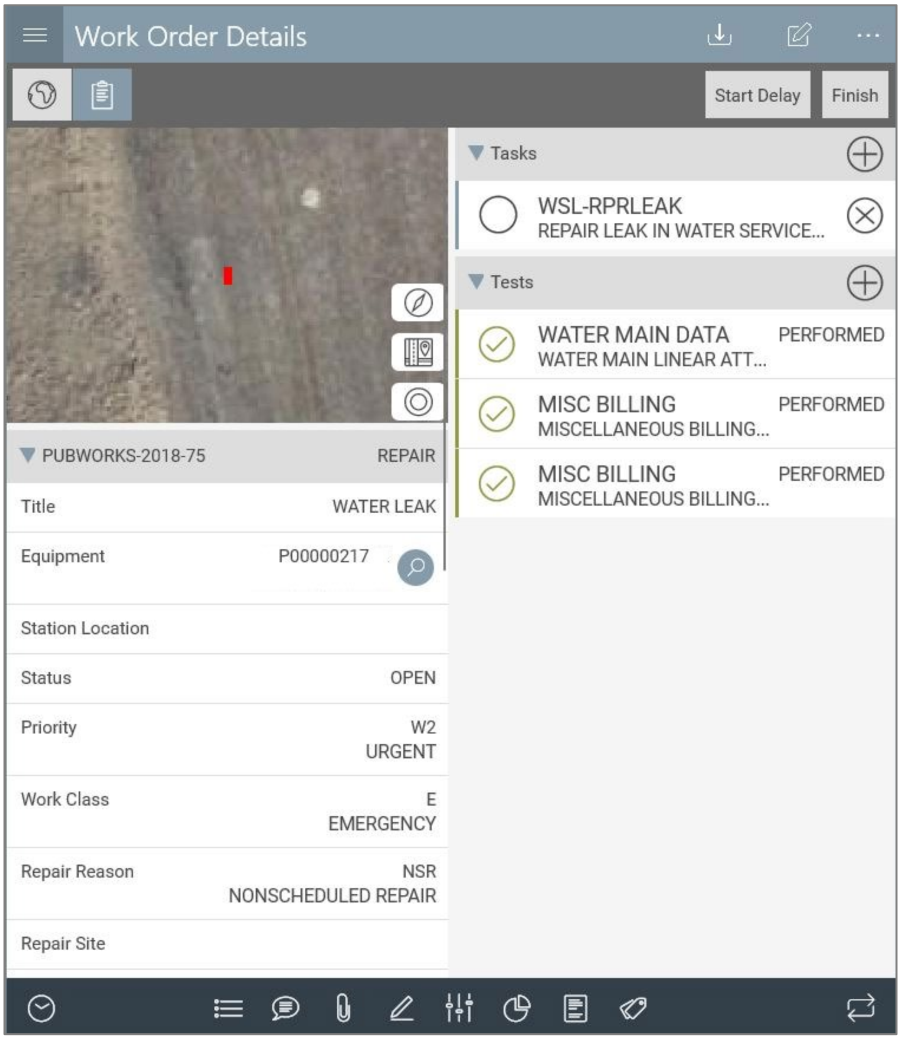


The List View displays work orders and assets in a sortable and filterable list. Click on the status icon of a PM checklist to complete it.

The List View displays an icon and text to indicate to whom the work order is assigned. Stacked icons show for a crew.

Work Order Details Page

Tapping on a work order launches the Work Order Details page which displays basic information, as well as Tasks, Tests, Notes, Service Requests, Attributes, and Files. With the exception of Tasks, each section will only display if it contains items. Each section header has a **+** button that can be used to add an item.



Tasks Section

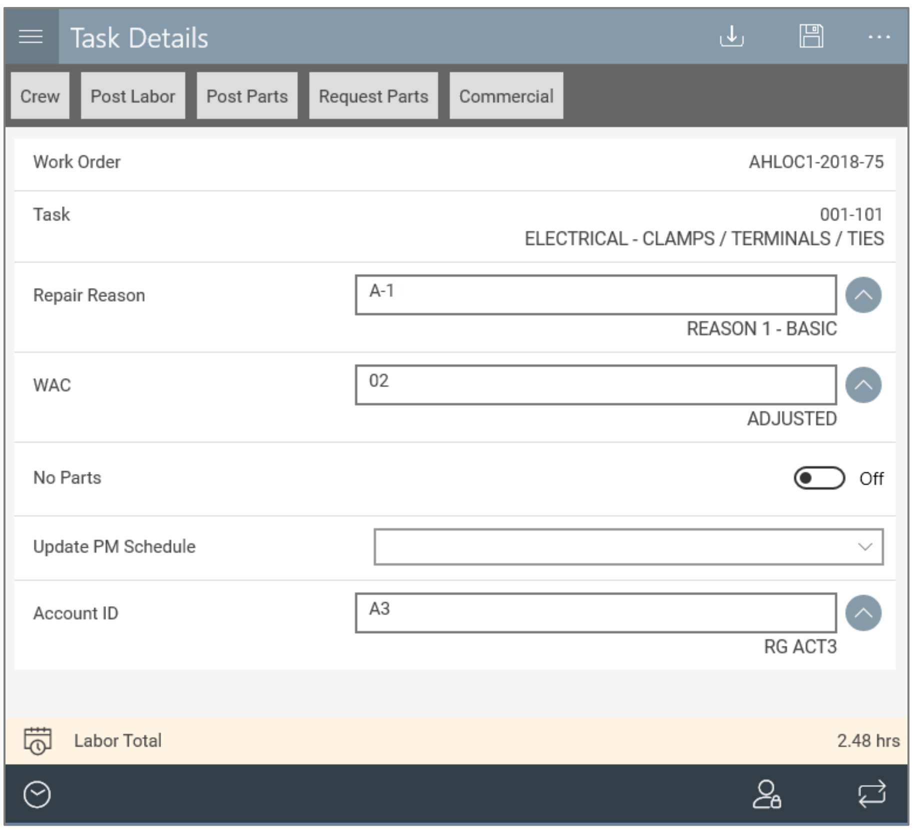
If real-time labor is enabled then a play or stop button will display that will allow you to start or stop labor on a task.

- A task is considered complete when it has been assigned a Final Status WAC and a green check mark will display.
- A screw icon is shown if parts have been issued to a task.

- A checklist icon is shown if the task is a PM Checklist task. You can complete a PM checklist task by clicking on the status icon. A green check mark will be displayed when all underlying PM tasks are completed.
- Tasks can be removed only if they are not completed and have not had labor posted to them.

Note: There is an option that only allows employees to job onto tasks that they have either been assigned to or if they belong to a crew that has been assigned to the task. If enabled on the Employee Classification screen in Enterprise Portal, this option will prevent an employee from jobbing onto a multi-asset work order if the employee has not been assigned to the multi-asset work order but it will not prevent employees from jobbing onto INDIRECT or GENERAL tasks as these types of tasks do not have work assignments.

Tapping on a task will take you to the task details page.



From the Task Details page, you can post labor, post parts, request parts, assign employees, and edit task information.

Note: When posting labor, an employee picker shows a list of employees for all crews not just crews assigned to the specified work order. Select the employee to post labor to the work order task.

Crew

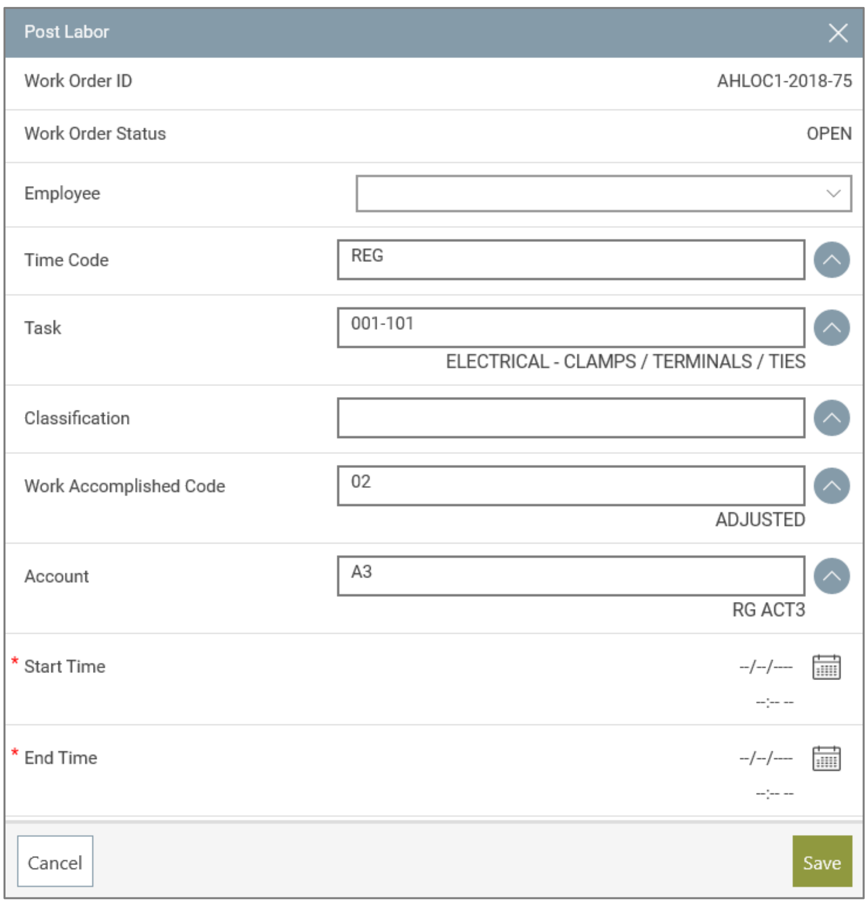
Tap Crew to open the Crew Management page to enter crew task information. When accessing this page from the Tasks section, the Crew Management screen opens with the work order and task defaulted.

For more information about this page, refer to the Crew Management section.

Post Labor

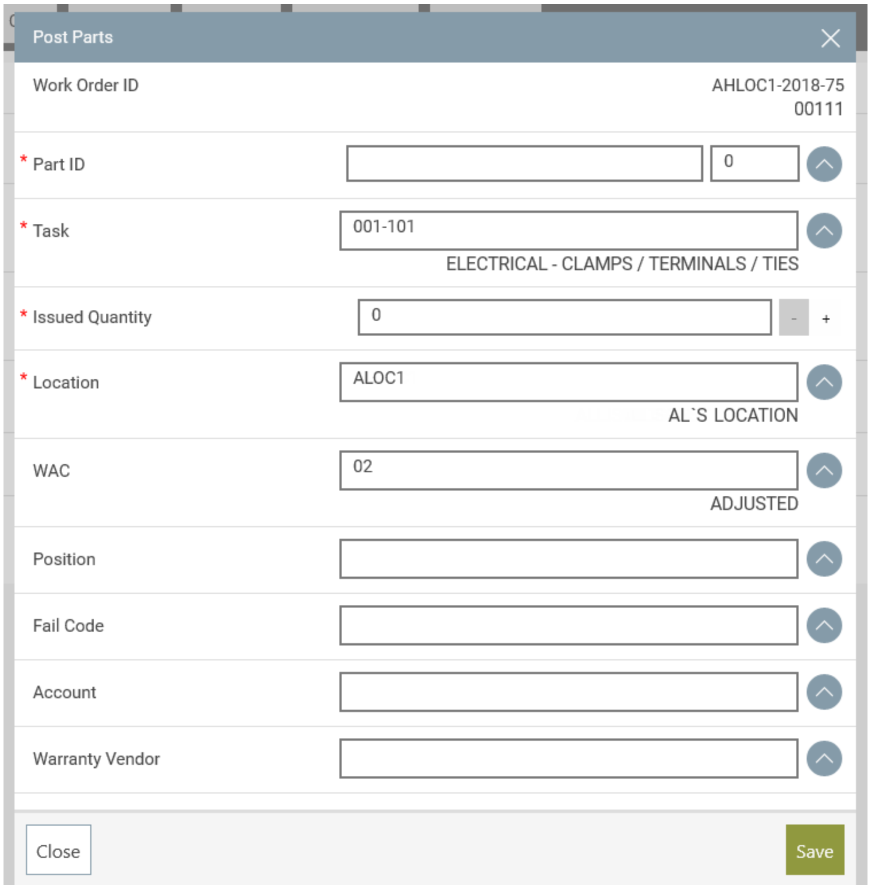
Tap **Post Labor** to enter information for labor entries. Available information fields on the Post Labor pop-in includes Work Order ID, Work Order Status, Employee, Time Code, Task, Classification, Work Accomplished Code, Account, Start Time, and End Time.

Once all information is completed, tap **Save**.



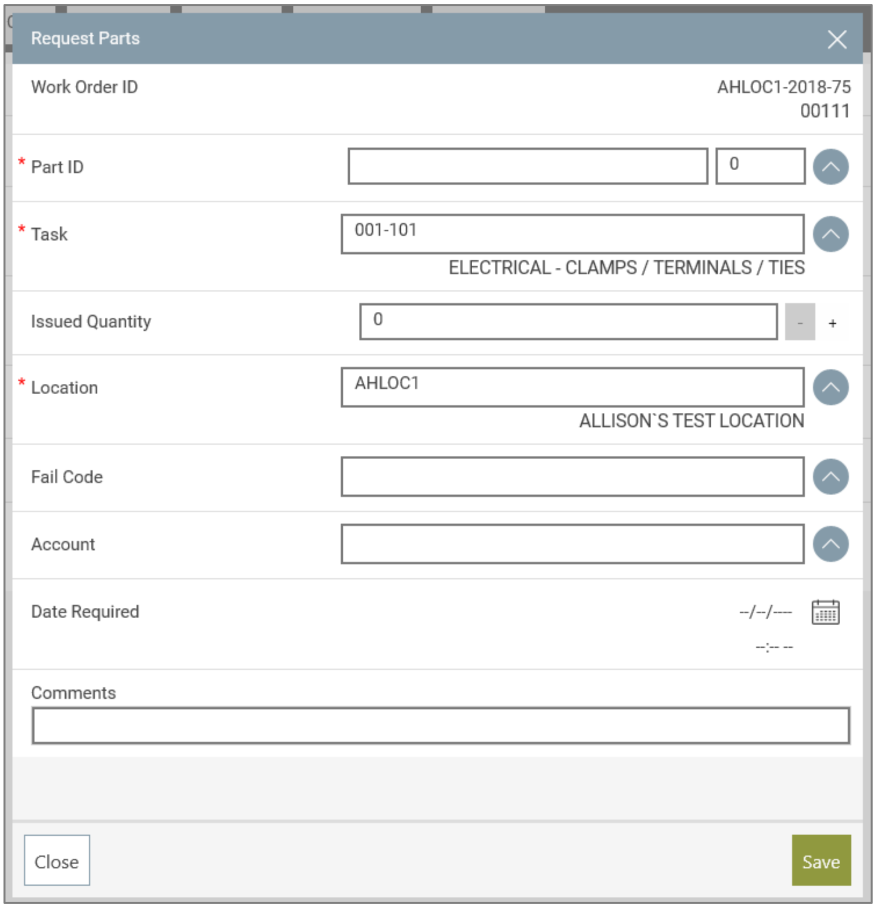
Post Parts

Tap Post Parts to open the Post Parts pop-in to enter part information to post parts to a task and location.



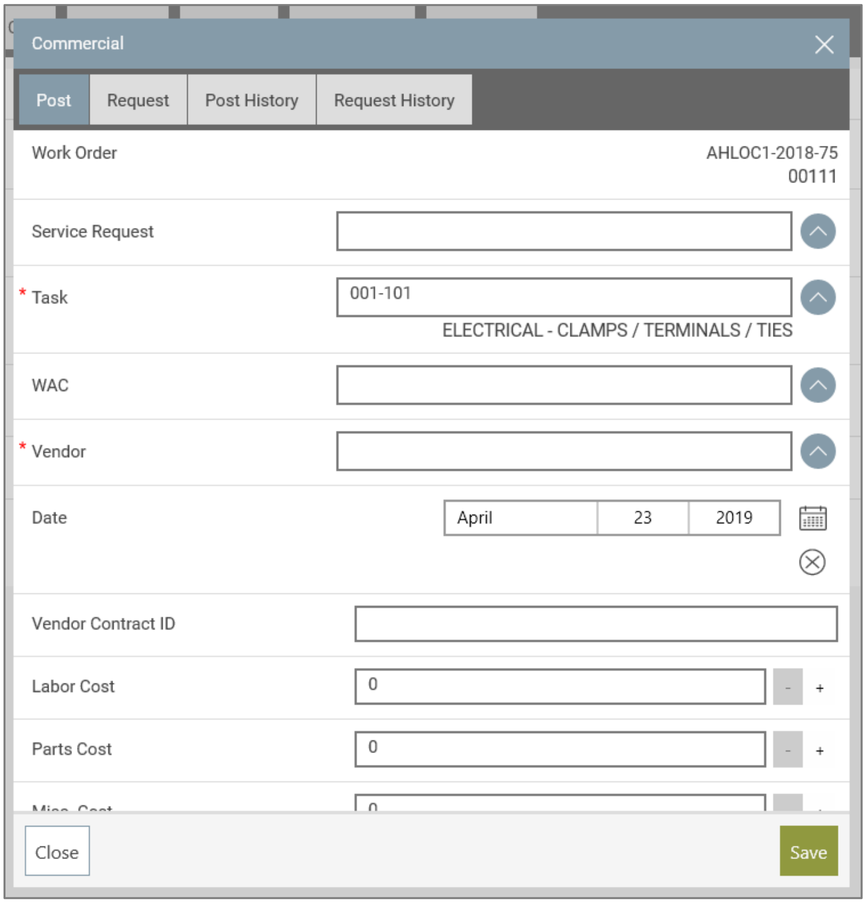
Request Parts

Tap Request Parts to enter a part request including the part ID, task, issued quantity, location, fail code, account, the date required, and any comments needed for the request.



Commercial

Tap Commercial to open the Commercial pop-in.



More Info Section

The More info section displays additional info on the work order. Click the Zoom icon to see more information about the department.

3C Summary Section

The 3C section allows you to view correction information for complaint, cause, and correction.

Tests Section

Tests are automatically added based on equipment class procedures. Tapping a test will take you to the test results page. A test is considered complete when it has been set to complete and a green check mark will display. Tests cannot be deleted off of a work order from a mobile device.

Service Request Section

Tapping a service request will take you to the service request detail page. A service request cannot be deleted off of a work order from a mobile device.

Notes Section

Tapping a note will display a popover containing additional information about the note. A note cannot be deleted once it is created.

Attributes Section

Tapping an attribute will open the attribute popover, allowing you to edit or delete attributes.

Files Section

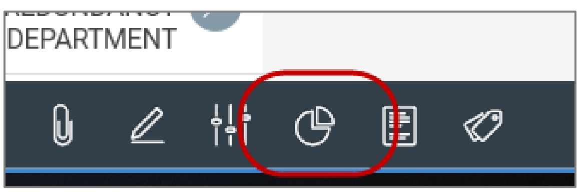
Tapping a file will open the file externally in Windows or will open it in a pop-in for iOS and Android devices. If edit mode is enabled, files can be removed and renamed from this section.

Equipment Usage Page

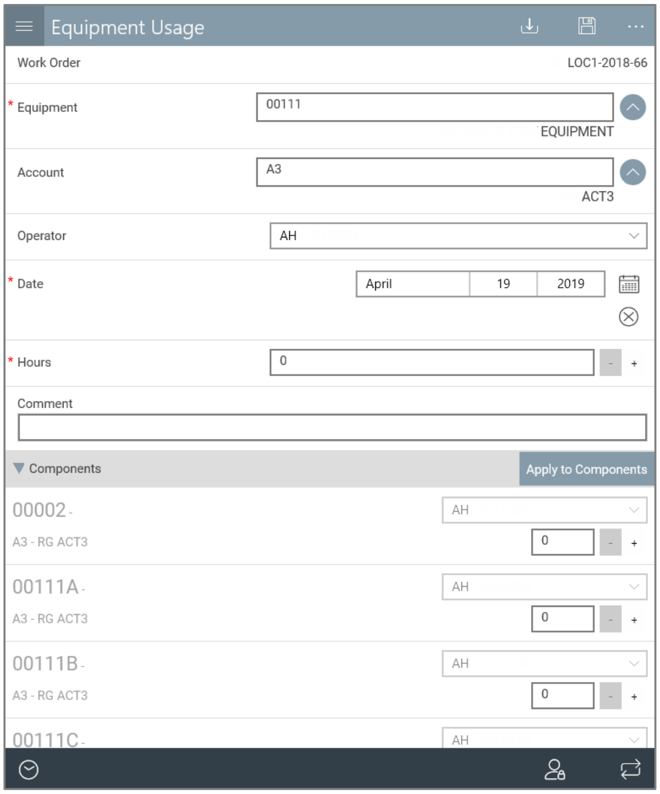
Use this page to post time for any equipment that was used for the work order, and view usage history for that equipment.

To add usage:

1. From the bottom of the Work Order Details page, tap the Equipment Usage button.



The Equipment Usage page displays.



2. Choose the equipment for the usage.

   Note: If equipment that has components is selected, an option to select its components displays called **Apply to Components**. Tap **Apply to Components**, and then select the necessary components to add them to the equipment usage. Tap the component itself to

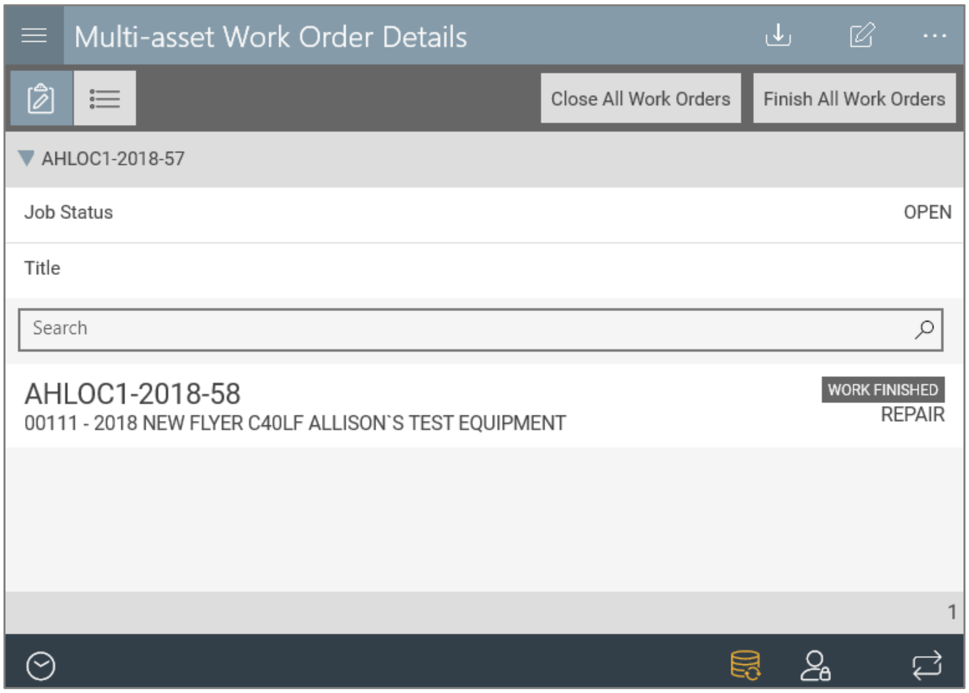
3. Enter the rest of the information (Account, Date of the usage, Hours used, and any Comments needed).

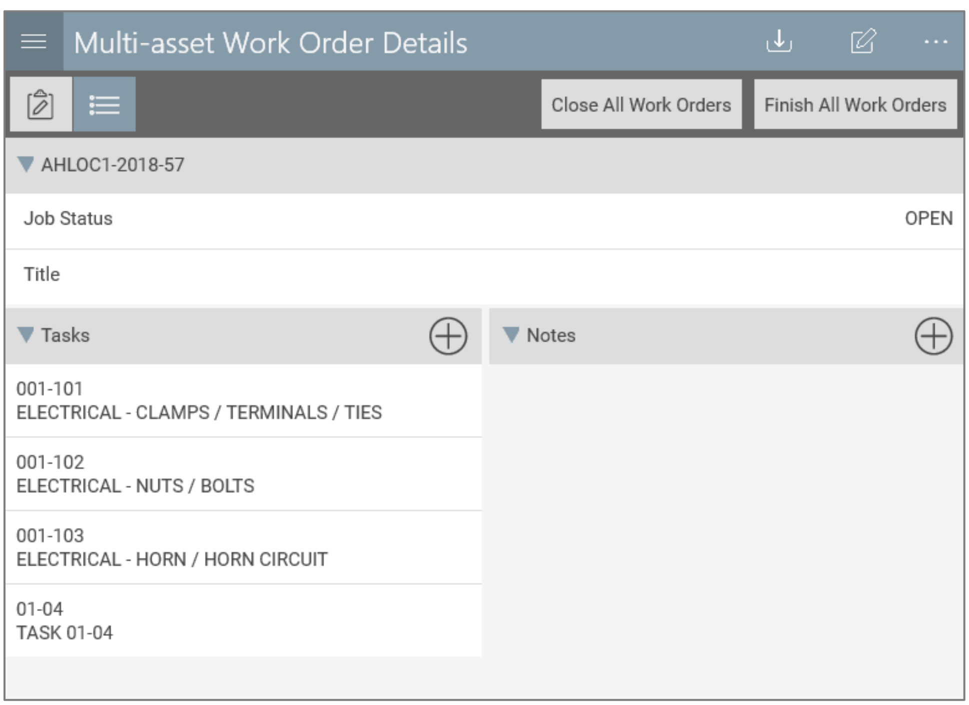
   Note: The operator listed in the Operator field above will automatically be assigned to components. Change these as needed by using the drop-down list. This drop-down allows you to choose from operators assigned at the location.

4. Tap the Save icon.

Multi-asset Details Page

If a multi-asset work order (MAWO) is selected, you will be taken to the Multi-asset Work Order Details page. This page has two tabs to show details and associated information. The main tab shows details of the work order and a list of associated work orders. The secondary information tab displays tasks and notes for the multi-asset work order. Actions that can be taken from this page include editing job status, title, adding tasks and notes, and finishing child work orders.





If you are in **View** mode, a **Finish All Work Orders** button displays in the top left of the main header. If in **Edit** mode, the button will change to **Finish Selected Work Orders** and will apply to only the selected work orders. A work order must have all tasks and tests completed before it can be finished.

Selecting a child work order from the list will go to the work order details page for that work order, and all the same actions of a normal work order can be performed there.

A MAWO can have its own tasks which behave much the same as a normal work order task. The primary differences are posting labor and parts.

- When posting labor to a MAWO task, the user will be asked to distribute the hours across the children of the MAWO.
- When posting parts to a MAWO task, the user will be asked to distribute the parts across the children of the MAWO.

Creating a New Work Order

Note: When creating a work order, if you have the **Automatically add to WO** option checked for that test type, the test will be added to the new work order.

1. Click the add button on the toolbar.

   The Work Order Detail Page will display in Create Mode.

2. Select **PM** or **Repair** for the type of Work Order.
   - Selecting a **PM** type will automatically add a task for a required PM service if one is due.
   - For **PM** or **Repair**, any required tests will also automatically be added to the work order.

3. Enter the details for the work order.

   Note: If you back out after information is entered or changed, a message displays asking if you want to discard the changes. Tap **Leave** or **Stay** to leave the work order and lose the information or changes, or stay on the page.

   A Service Request switch is available. If switched on a Service Request will be created when saving the task. The “Enable workflow for creation of a Service Request from a PM Checklist (Mobile only)” setting in Location Profile settings must be enabled to access this functionality.

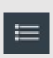
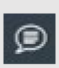
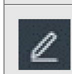
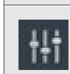
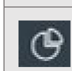
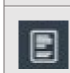
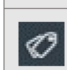
4. Click the Sync  button to submit the information.
    - Offline - Before the new work order is synced with the server, its temporary work order number will be displayed in brackets. This is to avoid overlapping any existing work order numbers, as well as to indicate that the work order is not yet synced with the server. After syncing, the number will be updated.
5. If the server rejects the creation, it may be edited or deferred. If deferred, any additional items created that reference this work order will also fail and will need to be deferred.

Editing a Work Order

From the Work Order Details page, click the Edit button. This will enter the work order into edit mode where most fields can be edited.

 Note: If you back out after information is entered or changed, a message displays asking if you want to discard the changes. Tap **Leave** or **Stay**.

The icon bar on the bottom of the Work Order Detail page allows you to complete additional functions as explained in the table below. Clicking on the corresponding icon will launch the pages for that workflow.

Icon	Description
	Add Task
	New Note
	Attachments
	New Service Request
	Test Results
	Equipment Usage
	Work History
	Attribute

Notes:

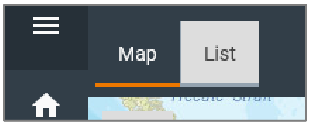
- Existing work order crew and employee assignments will be removed when a work order is transferred to a different location. Transferred work orders will no longer be shown in the work order list. This functionality is enabled by checking the “Transferring work to another responsible location will remove assignments” box on the Shop Activity – Setup – Options screen in Enterprise Portal.

Finishing and Closing a Work Order

Finishing and closing a work order requires that all tasks and tests be completed first. When finishing a PM work order, if no labor has been posted to any of the PM tasks, a warning dialog will be displayed with the options to continue or cancel.

8. Views

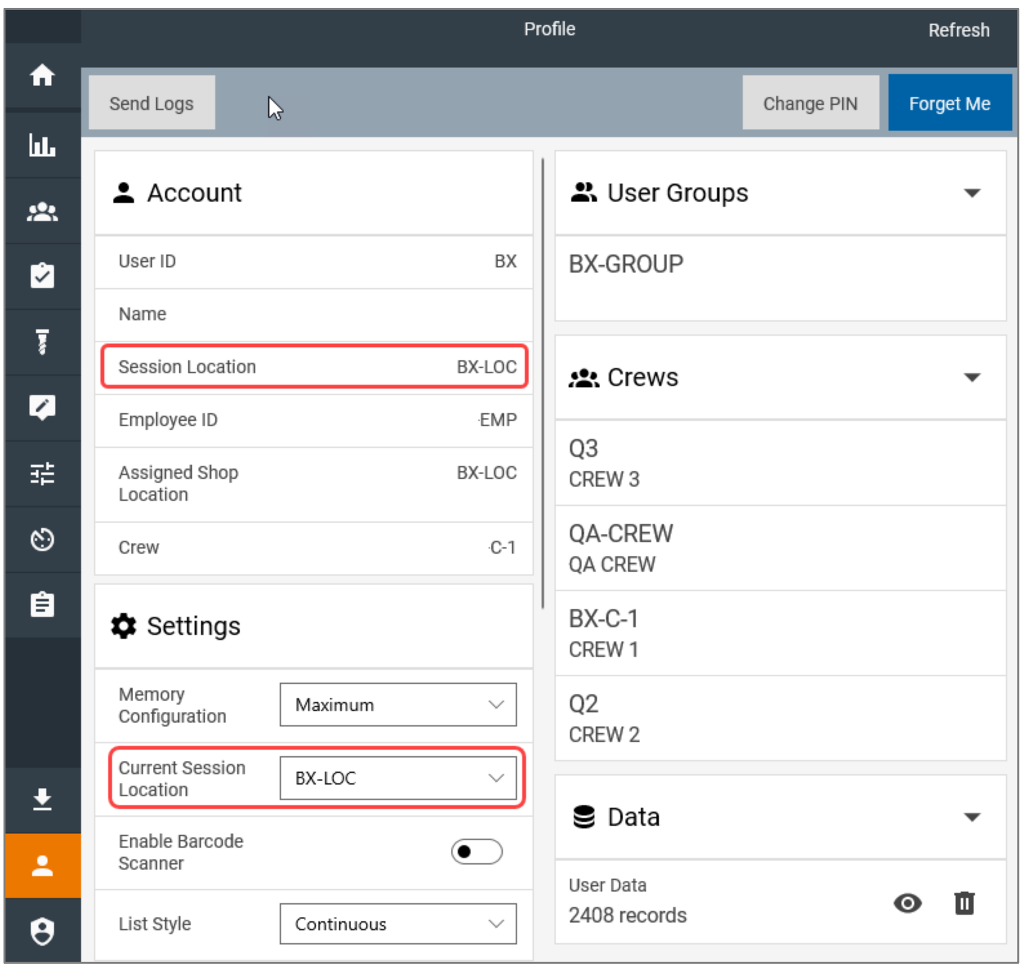
EAM Mobile portals display work and assets through various views depending on a user's profile and their supported locations. These views include the List and Map views which can be selected in the upper left corner of the portal screen.



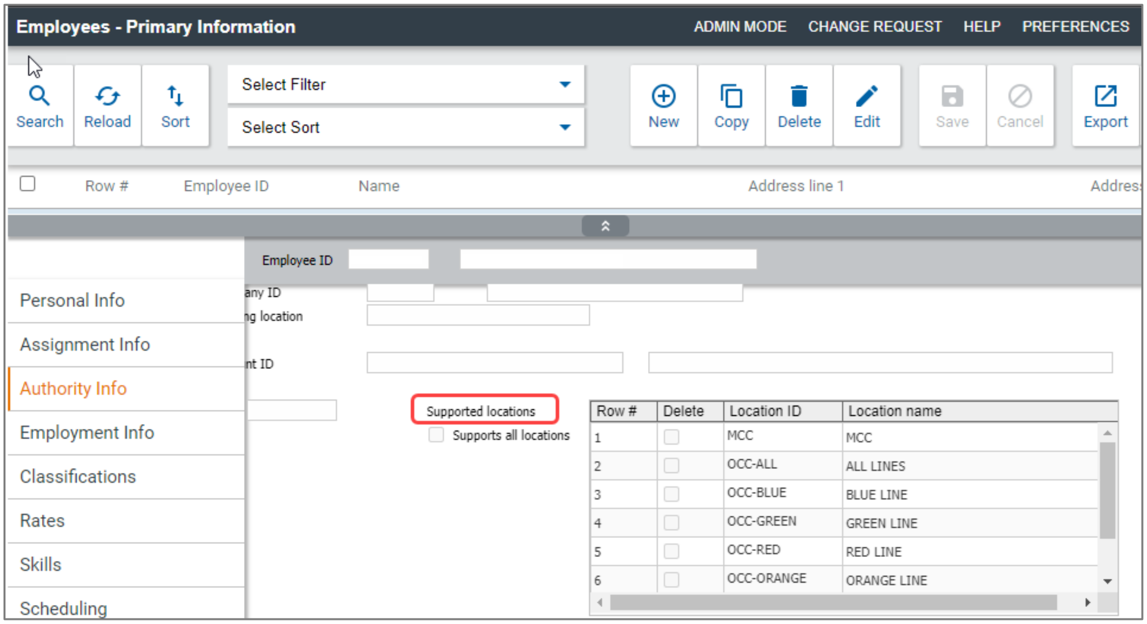
The views may display slightly different information, and what is downloaded may be different than what is displayed in each view. The following provides general user and location information as well as details about the differences in what is downloaded and viewed for the Service Requests, Work Orders, and Asset Management portals.

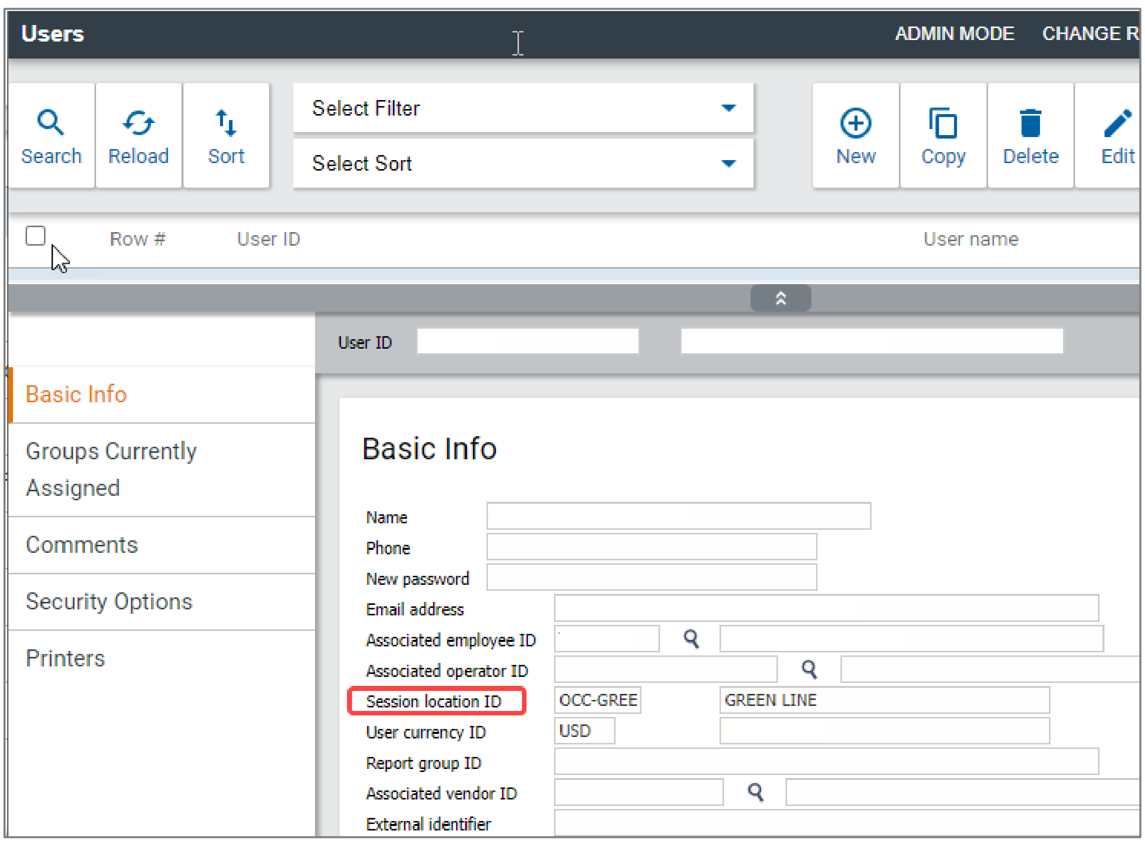
User and Location Information

User information and session location can be viewed on the User Profile page in EAM Mobile.



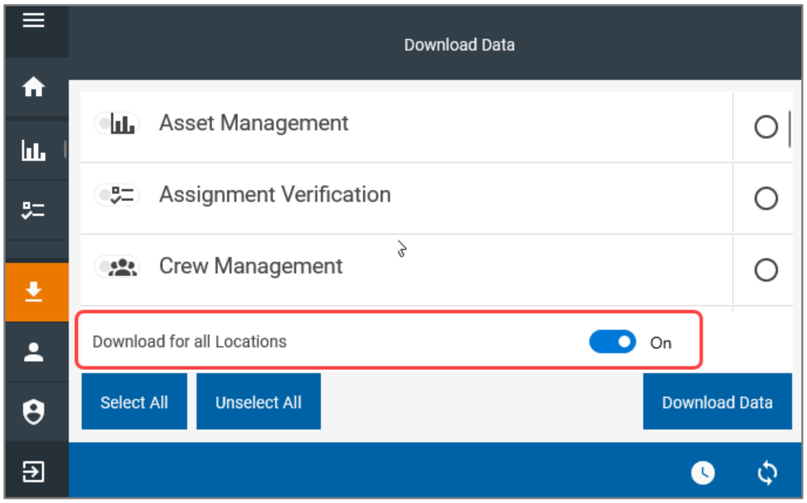
The location information is defined in the Enterprise Portal on the Employees – Primary Information screen and the Users screen.





Download Data - All Locations

At the bottom of the Download Data page, there is an option to **Download for all Locations**. If enabled, data across all locations regardless of a user's supported locations will be downloaded. Downloading for all locations should not be necessary for most workflows.



Exercise caution if using this setting as download time will significantly increase since EAM Mobile is retrieving data for all locations.

Note: If you download data for locations that are not within your supported locations, background sync will not keep this data updated and manually syncing the data will be necessary.

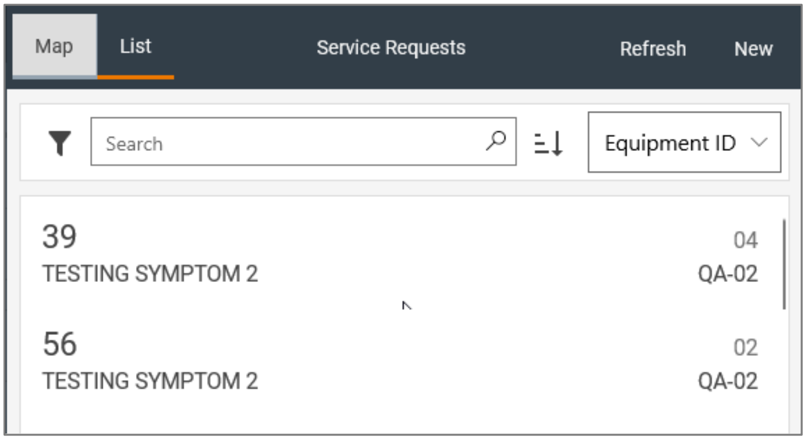
Service Requests Portal

Downloads

The following is information that is downloaded when accessing the Data Download Page  or when clicking the Refresh button Refresh :

- Pending service requests where shop location is session, employee, or supported location.
- Any service requests directly assigned through Work Assignment.
- Any service requests that are linked to assigned work orders.

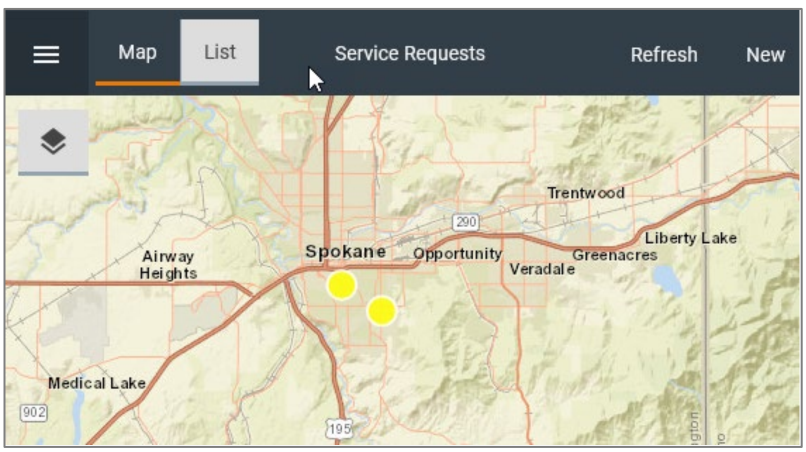
List View



The following information is displayed in the List view:

- Open and Pending service requests that are not assigned to work orders where shop location is employee's supported location, or the employee supports all locations.

Map View

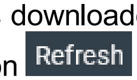


The following information is displayed in the Map view:

- All Open and Pending service requests that can be displayed on the map.

Work Orders Portal

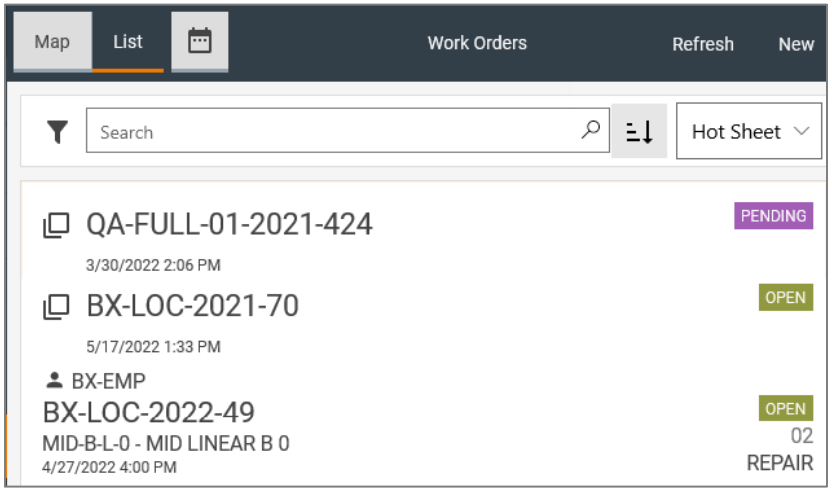
Downloads

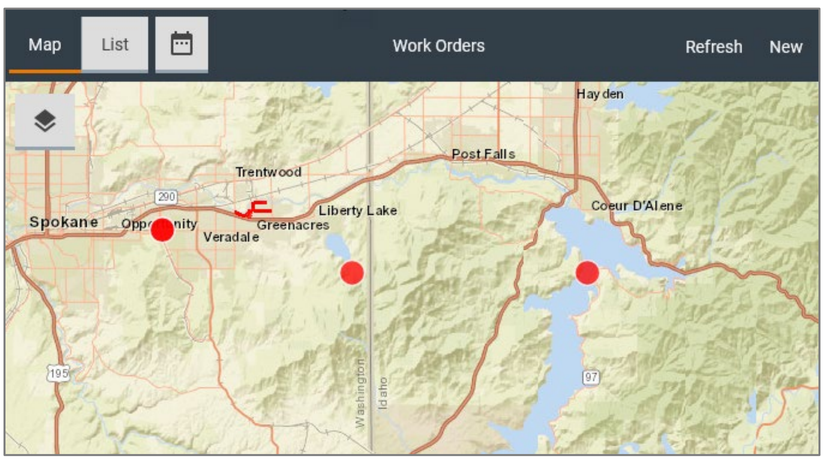
The following is information that is downloaded when accessing the Data Download Page  or when clicking the Refresh button 

:

- All work orders assigned to the current employee or crew which is the **My Work** list within the Technician portal in the web application.

List and Map Views





The following information is displayed in the List and Map views:

- Open and Pending work orders assigned to the current employee or crew which is the **My Work** list within the Technician Portal in the web application.

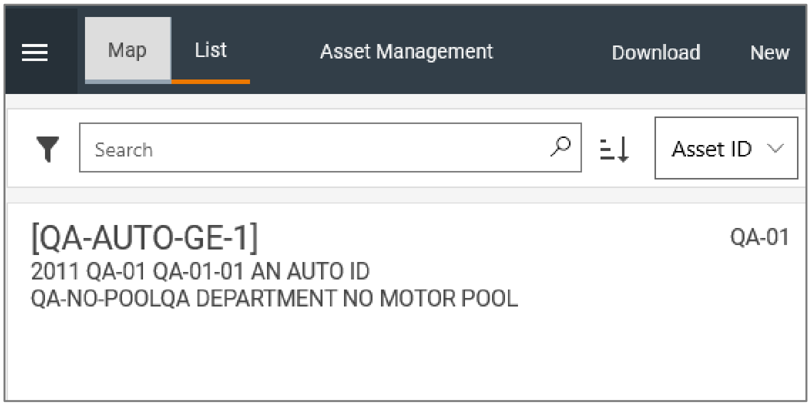
Asset Management Portal

Downloads

The Asset Management portal only downloads assets from downloaded service requests and work orders by default.

Users can download more assets as needed.

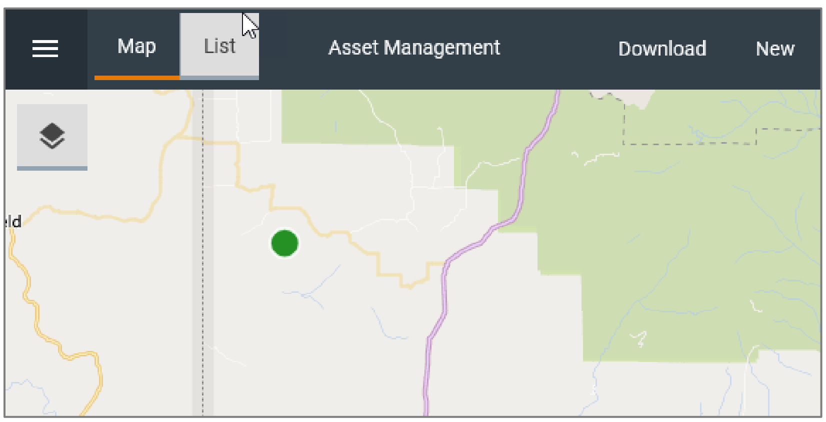
List View



The following information is displayed in the List view:

- All active assets where the life cycle status code > status category is not TEMPLATE.

Map View



The following information is displayed in the Map view:

- All assets that can be displayed on the map.

Appendix A. Troubleshooting

This section contains errors or situations that may be encountered when using EAM Mobile with possible resolutions. If you continue to experience issues, please contact Customer Care.

A.1 Failed Due to Unknown Reason

This error displays, when trying to install EAM Mobile, if the Windows 10 version on your system is not up to date. To fix this issue, update Windows 10 to the latest version. Once Windows is updated, reinstall EAM Mobile.

A.2 Connection Failed: Unable to retrieve device token

This error appears on the server settings page. It will be reported when there is a communication or connection issue between client and server. This issue can generally be resolved by doing the following:

- Verify that the server address and ports were configured correctly.
- Ensure that you can ping the server.
- Ensure that data services is running and there are no errors in the logs.

A.3 Unable to Login

If receiving the "Unable to Login" error when attempting to log in, check the following:

Client Side	Username and password correct
Server Side	• User disabled • User is not configured as a mobile user • User’s associated employee is not active • User’s associated employee is not configured to charge time • User’s user group is not configured to support access to at least one mobile application • User's session location is not configured • Mobile licensing is not configured

A.4 Calendar Errors – Work Orders Portal

In the Work Orders Portal, if a calendar is generated for a year other than the current year, the following queue errors are displayed: “Warning: Calendar _____ has days missing between

____ and ______" and "Warning: no calendar generated for this time frame - PR-ERR:986." This prevents users from finishing or closing work orders in a time frame not yet generated on the calendar.

These errors can be bypassed by clicking **OK** and continuing to save the Work Order.

This situation can be fixed by verifying that calendars for the specified year have been generated correctly in the system.

A.5 Mobile and Mapping DNS Settings

DNS forwarding for organizations using mobile and mapping capabilities may not be recognized between the internal IP and the external ID on the same machine. This address mapping is needed for mobile data services to work correctly. To fix this, edit the hosts file to add your internal IP and the public DNS name.

To edit the Hosts file:

1. Open the Hosts file. This file is found in the following location:

   C:\Windows\system32\drivers\etc\hosts

2. Enter your internal IP and public DNS name after the # entries as shown in the screenshot below.

```
hosts.txt - Notepad
File  Edit  Format  View  Help
# Copyright (c) 1993-2009 Microsoft Corp.
#
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows.
#
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host name.
# The IP address and the host name should be separated by at least one
# space.
#
# Additionally, comments (such as these) may be inserted on individual
# lines or following the machine name denoted by a '#' symbol.
#
# For example:
#
#      100.20.20.20     dino.example.com        # source server
#       30.30.60.10     x.example.com           # x client host

# localhost name resolution is handled within DNS itself.
#       100.0.0.1       localhost
#       ::1             localhost
        10.10.100.10    xxx.publicDNSname.com
```

3. Save and close the file.