peritus
business solutions
the home of PFIM software

PFIM MOBILE
workforce management

PFIM Mobile
Workforce Management

Full Client

PFIM CMMS
maintenance management & monitoring

Mobile Application

Web Interface

One Database

Index

Index

Overview

The PFIM Mobile Workforce Management Application was developed to provide a means to incorporate an organisation's mobile work force into the daily IT processes thereby making the resulting data more current and accurate and removing needless duplication of data processing.

The PFIM Mobile Workforce Management Application provides a means to notify teams in the field of updates and changes to their workload and in turn allows them to update their progress and make use of the organisation's investment in the PFIM Maintenance Management System (CMMS) via inquiries into the accumulated service history and knowledgebase.

The PFIM Mobile Workforce Management Application makes use of the official Android App of the open source Zxing project: http://github.com/zxing/zxing

Back to Index

Features

Access to the program and the PFIM CMMS installation is protected and requires specific processes to have been completed before a device can be added to the system.

A device only receives the Jobs and related information that have been allocated to the technician that is assigned to the device. This reduces data costs and restricts access to information.

Certain data is stored on the device to enable the technician to perform routine maintenance without connectivity to the organisation's PFIM CMMS installation.

Lists of Serial Numbered units can be linked to Job Cards in order for the technicians to verify that the correct equipment is located and maintained. Barcodes can be scanned to ensure accuracy.

Job Card appointments can be marked as complete by the technicians which will then enable the admin staff to proceed with invoicing of the work.

Callouts for after hours work and Faults that are detected during routine maintenance can be reported live from the PFIM Mobile Workforce Management Application allowing the admin teams at the office to proceed with quotations and requests for authorisations to proceed with repairs before the technicians return to the office.

Photos can be uploaded via the Mobile Application to the organisation's PFIM CMMS installation to record the condition and state of equipment for historic and reference purposes.

Quotations can be made out on the device in order to start the quoting process and define requirements.

Data can be synchronised with the organisation's PFIM CMMS periodically and program updates can be installed when convenient to do so, preferably over a WiFi connection.

Edit Configuration

After launching the PFIM Mobile Workforce Management Application on your device the Edit Configuration or if you have a configuration the Login screen will be displayed.

To access the Edit Configuration screen from the Login screen select the Menu Button ≡ then choose Edit Selected Configuration Item.

When done select Save to save your settings and return to the Login screen.

In the web interface your PFIM admin can setup their preferred settings and you can then scan the QR Code which will apply these settings.

NOTE:

This document is written based on the Peritus recommended Settings.

NOTE: Effects of changing these settings are documented on our wiki.

Back to Index

Sign In (Login) Screen

After launching the PFIM Mobile Workforce Management Application on your device the login screen is displayed. You need to enter the User ID that you were provided with by your PFIM admin. On touch screen devices, tapping on the User ID field will place the cursor in the field. The User ID is case sensitive so be sure to enter the information correctly.

Enter the password that you were assigned into the Password field. The Password is case sensitive so be sure to enter the information correctly, by clicking the show password button you can show or hide your password.

Tap the Login button to login.

The Data Sync Screen is displayed.

NOTE: It is only necessary to have a connection to the organisation's PFIM CMMS installation the first time that this action is performed.
However after an incorrect login attempt you will be required to have a connection for your next login.

Back to Index

Data Sync

The Data Sync screen is where you have the option to Synchronise with your organisation's PFIM CMMS installation.

The last sync date and time will show next to the button.

Synchronising will first upload/push all of your changes and updates to your organisation's PFIM CMMS installation and then download/pull all the Jobs and related information onto your device.

It is necessary to have a connection to the organisation's PFIM CMMS installation in order for this action to be performed.

To Synchronise tap the Refresh button.

A Status indicator will display while the application sends and receives data. Once the process is complete the hourglass will disappear and a message 'Successfully Refreshed!' will pop-up.

To continue tap O K.

You HAVE TO SYNC in order for your device to <u>RECEIVE</u> the latest data and in order to <u>SEND</u> any work that you may have done to your organisation's PFIM CMMS installation.

Back to Index

Main Menu Screen

As this application is designed for Technicians after a refresh we skip this page and continue directly to your list of Jobs, to access this page select back from the Job Card List.

(Your Main Menu may have 1 or more options depending on your system configuration and access rights.)

My Job Cards: Opens your Job Card List.

Dashboard: Launches a quick view of current dashboards you have access to.

About PFIM Mobile: Everyone has this it shows who is logged in, server path, screen resolution dpi, your version and updates are done here.

Job Card List Screen

The Job Card List screen displays the list of open Job Cards that have been assigned to you and are still waiting for you to mark as complete.

To retrieve a Job Card in order to update or work with it – select it in the list (tap on it) and then tap on the Go To Selected Job Card button at the bottom of the screen.

Tapping on the Menu button on the top right hand corner of the screen or tap and hold on line item to display the Job Card List Menu.

Back to Index
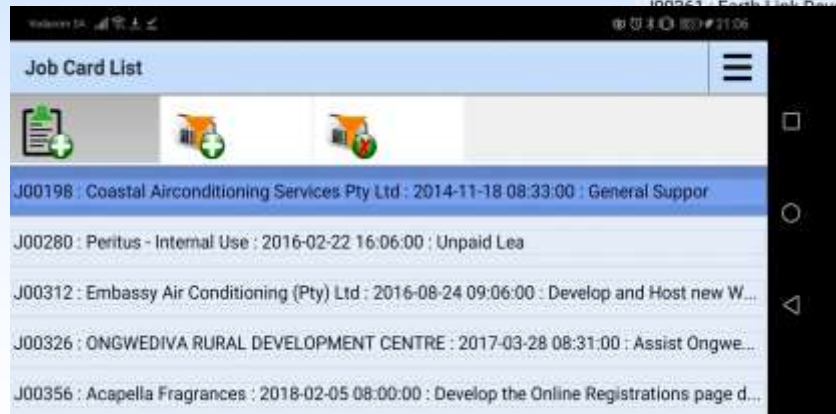
Job Card

The Job Card View Screen will displays:
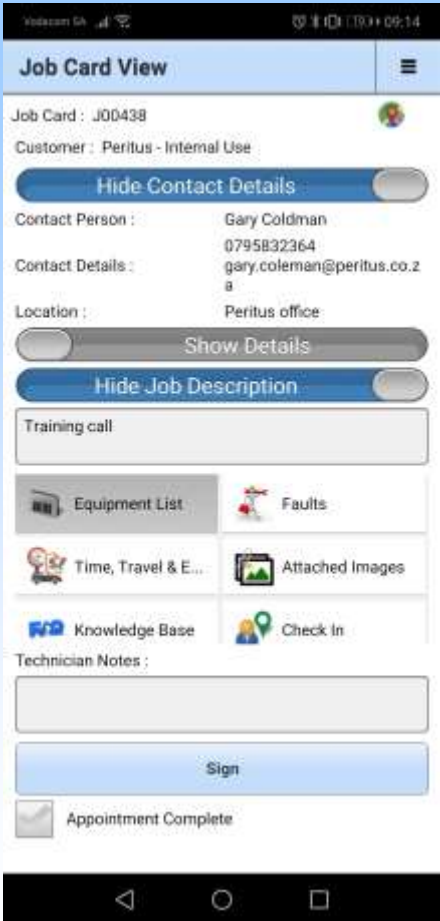
The details of time, address… in Details
The instructions of what to do in Job Description.

📍 Navigate to launches the preferred map software on your device with directions to the client site.

🏭 Equipment List: maintain add or link equipment.

🔧 Faults: list or log faults.

🛒 Time, Travel & Expenses: list or add TT&E items.

🖼 Attached Images: list or link photos from device.

📟 Knowledge Base: Find saved solutions.

👥📍 Check in or Check out: Store location and notify office of movement.

Technician Notes You can enter any notes here. Tap to display the keyboard.

After all units have been scanned and serviced you can click Sign to get the Job Signed off and tap the Appointment Complete tick box.

Amending The Appointment

If your system is configured to permit amending the appointment – from the Job Card View screen – you can tap on the Appointment Start Date / Time or on the Appointment End Date / Time in order to amend the date, time and duration of the appointment. These changes will be updated to your organisation's PFIM CMMS installation and the scheduling system will then display the appointment as you have amended it.

Any adjustments must be made using the < left right > or ∧ up down ∨ labelled buttons. Once you are satisfied with the date and time tap the button labelled Done.

The Done and Cancel button may be off the screen on some devices scroll down if needed.

To abort your changes tap the Cancel button.

**Back to Index**

Equipment List

This screen displays a list of the Serial Numbered Units that need to be attended to on this Job Card.
To display this screen tap on Equipment List on the Job Card Screen.

Units that have already been marked as serviced will not show select Remove Filter will display them with a green background, while those that have not yet been marked as serviced will have a blue background.

Add Unit: Create a new piece of equipment for site.

Link Unit: Link unit previously added to this Job Card

Add Filter: Exclude Serviced equipment.

Remove Filter: show all equipment for job.

Search Equipment: Find equipment via Barcode scanning or capture of Serial Number or Asset Tag.

By selecting the Unit on this screen you will be taken to the unit and then maintenance tasks if there are any that have not been completed.

Back to Index
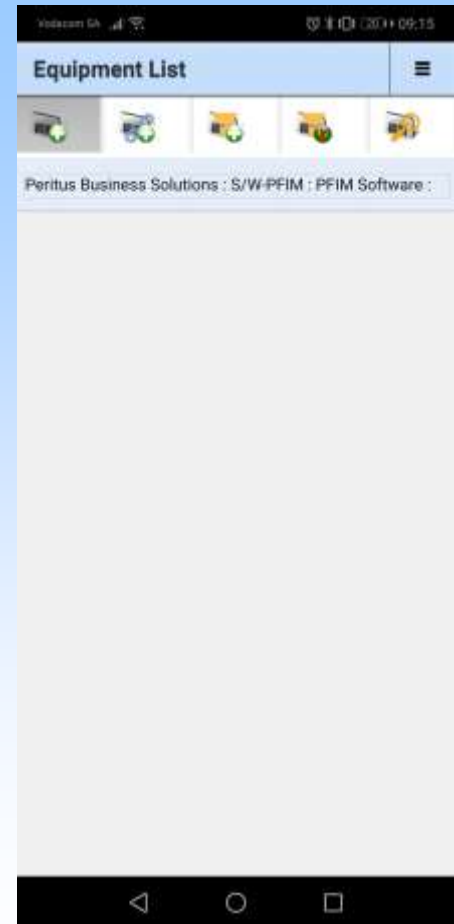
Add / Edit Equipment

Selecting the Unit from the Serial Number List will display information about the selected Unit.

🔋 Save: Save changes to this unit.

🛠 Maintain: Go to Maintain unit or add Maintenance Plan.

☒ Service History: Shows past jobs for the selected unit.

☑ Mark Unit as serviced: Only available if Allow Equipment to be marked as Serviced = ON

🔍 Select Make: The Make must be selected from the list of serial number stock items set up in your organization.

Capture the detail of the Model Number.

If the Asset No or Serial No on the unit are barcoded you can scan the barcode and then tap the button next to Serial No or Asset No to automatically insert the scanned barcode into the appropriate field.

Please capture location information in the location field to make it easier to find in future.

14

# Serial Number To Link to Job

Link Existing Unit:

When selecting 'Link Existing Unit' from the Menu you will need an internet connection to do this. A list of units at that customer will be displayed that can now be linked to your current job.

Select the unit you would like to link to the job. It will prompt for a connection for each unit select yes.

Unlink Current Unit:

If for some reason a unit is assigned to your job that should not be attended to or no longer exists (decommissioned) - select back to see list of linked units then click and hold the unit to select it and launch the menu select unlink current unit.

Caution: removing units from a job should always be reported to the admin department to ensure the unit status or contract are updated correctly.
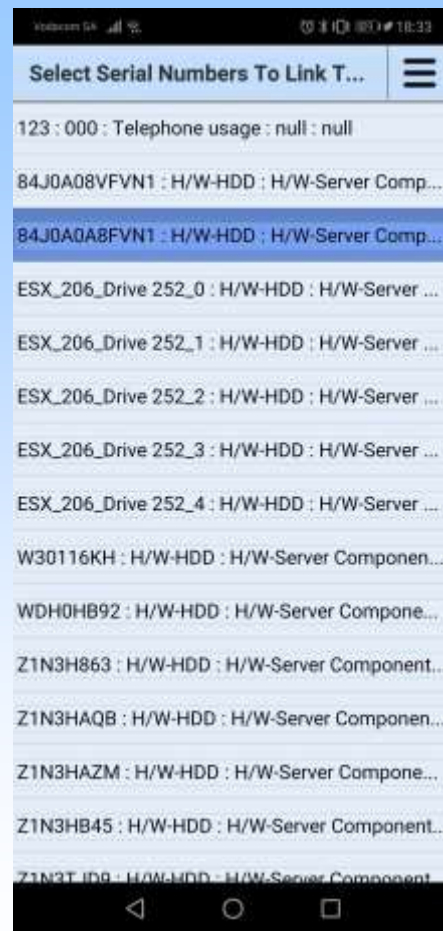
Serial Number Maintain Unit / Add Maintenance Plan

This screen displays a list of Tasks to be performed against the selected serial number and must be repeated for each serial number.

If there are no tasks then you will get the link service schedule button select it the PFIM admin should have developed maintenance plans with tasks for each equipment category.

Select the appropriate Service Schedule from the list and it will generate the tasks for this serial number.

Note:

When first selecting a serial number if there are tasks it may bypass this screen and launch the first task.

Otherwise select the task you are performing this will launch the Update Task form.

Back to Index
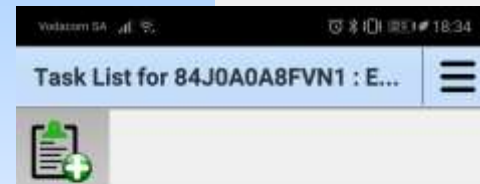
Update Task

Updating a task enables the Technician to capture a value or tick a tick box.

The technician can at this point make notes specific to this test.

Thresholds and Design optimal values set for this test are displayed on this page.

 Selecting the green arrow next will save and load the next Task.

By selecting back you are requested to save changes.

To set a task as complete but not done select the tick and then untick this will set it as complete but not done.
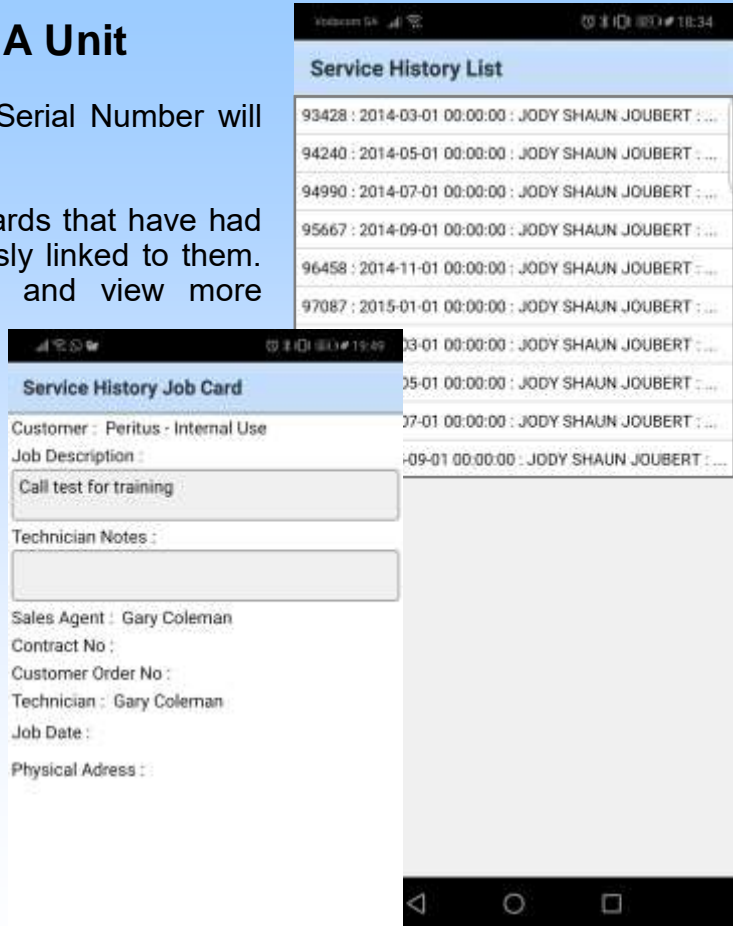
View Service History For A Unit

Selecting View Service History from the Serial Number will display the Service History List.

The Service History List is a list of all Job Cards that have had the Serial Number that you selected previously linked to them. To display the details of the Job Cards and view more information – tap on the Job Card in the list to open it.

Select back when done to return to the Service History List and back again to return to the selected Serial number screen.

Back to Index

Search Equipment

By capturing a Barcode or Asset Tag in the search field you are able to search for an existing piece of equipment that is linked to the selected Job.

Open the Search feature.

By selecting the scan icon the program will launch Z-Xing Barcode scanner after scanning returning to PFIM will paste the scan results in the Search Field and initiate a search.

After capturing the unit manually or scanning it the search will check to see if this unit is scheduled for service at this time, if found it will commence by opening unit.

Close search will close the Search feature.
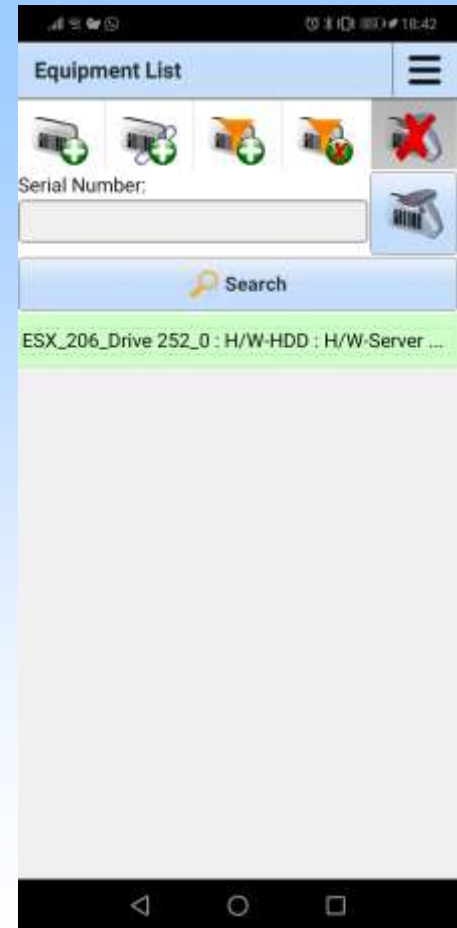
Scanning Barcodes

To launch the Barcode Scanner tap the button labelled Launch Barcode Scanner from the Job Card View screen under Barcode Scanning Options.

As the barcode scanning application instructs (in text at the bottom of the screen) "Place the barcode to be scanned inside the viewfinder rectangle to scan it" – place the Red Line over the barcode and ensure that the barcode fits between the ends of the red line. Move your device closer or further from the barcode to enable the scanner to focus on the barcode.

When the barcode has been successfully scanned the barcode will be displayed on the screen as in the image below.

To return to the PFIM Mobile Workforce Management Application click the Back button on your mobile device.

If you are unsuccessful in scanning the serial number you can return to PFIM and select Manually Enter Unit Serial Number and capture the Asset Tag or Serial Number.

**Back to Index**

After Scanning A Barcode

After you return to the PFIM Mobile Workforce Management Application you can tap the Verify Scanned Unit For Servicing button – this will advise you as to whether the barcode that was most recently scanned should be serviced or not or if it has already been scanned or serviced.

The first screen shows a successful confirmation – that you can proceed to service the unit if mark as service is enabled.

The second screen shows what is displayed when you have scanned a barcode that is NOT in the list of units to be serviced.

The third screen shows what is displayed when you have scanned a barcode that has already been marked as serviced.

After all units have been scanned and serviced you can tap the Appointment Complete tick box. This will alert your admin department to the fact that you have completed the Job Card when you next Synchronise with your organisation's PFIM CMMS installation.
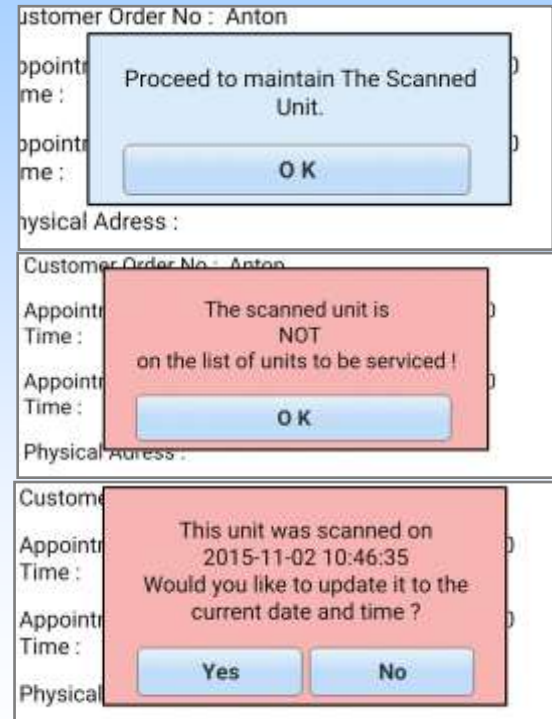
Log Fault / Fault List Screen

Selecting the View Faults option from the Job Card displays a list of Faults that have been logged for the selected Job Card.

To select a Fault in order to view it or to upload or link pictures to it – tap on it in the list and the View Fault screen will be displayed.

To log a new fault select the Log a new Fault Icon and complete the details for the fault. Use the Search buttons to get your organisations Categories and priorities. If you are able to acquire a Purchase Order Number from your customer then enter it into the Purchase Order field.

Select save. This will create the fault and return you to the fault list displaying the fault reference number that can be supplied to the client if needed.

22

View / Edit Fault

Tapping the Fault displays the Logged Fault.

You can select the option to Attach Images or View Attached Images – this will show a list of pictures (images) that have already been attached or linked to the selected fault.

You can also select the option to upload and link pictures (images) to the selected fault.

You can open the associated Quotation or create and associate a quotation to this fault.

Back to Index

Attached Images Screen

 From the Job Card View screen and the View Fault screen you can select the option to View Attached Images. This will allow you to view photos and images that have previously been uploaded to your organisation's PFIM CMMS installation either by you or by other operators.

The list of attached images is displayed.

To zoom or view a full screen version of the photo tap the image to view, pinch zoom allows you to zoom in and out of the immage.

 To add an attached image select the Add Image button.
If access to storage has not been granted it will prompt now, if it has not been granted yet.

24
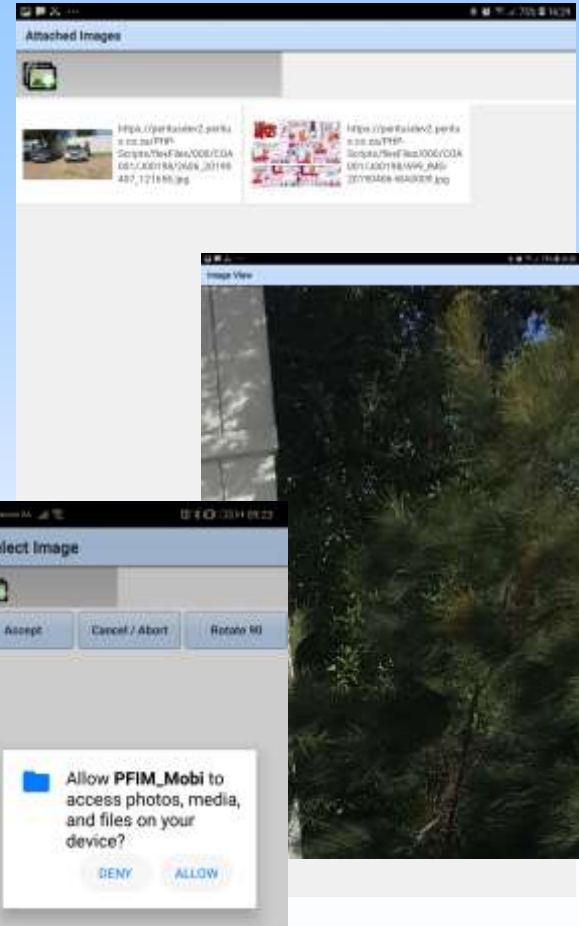
Select Images To Link Screen

 After you select the option to Attach and Upload Images – the Select Images To Link screen is displayed.

Please note that this allows you to select pictures from your Gallery – this means that you must have already taken any photos that you want to upload or link to the fault.

When the image is loaded it is available to rotate till you are happy, then select Accept.
It will now return you to the Images to be linked screen.

 Selecting the No Entry will empty your list and remove all queued items.

 Selecting upload will push your images to the server and associate it with the jobcard.

 Pause indicates image is queued for upload.

 Tick indicates image has been uploaded and linked to jobcard

Back to Index

25
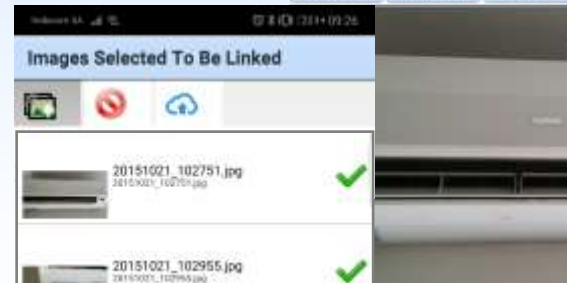
Quotation

This gives access to edit and amend quotes.

Save enables you to save your changes to the quotation.

Insert Row will prompt with the stock list in order to add items to the Quotation.

Remove Row will remove the currently selected row from the Quotation.

Escalate Costs will escalate costs on all the line items by a percentage.

Markup Selling price will change the selling price on all items to be a percentage more than the cost.

Move Row Up will move the order of the currently selected row up.

Move Row Down will move the order of the currently selected row down.

Print Quote To PDF will download a PDF of the Quotation with the standard layout.

Print Quote MarkedUp To PDF will download a PDF of the Quotation showing markup percentage and profit values.

Quotation Edit

When selecting to edit a line item on a quote it will launch the quote item edit form.

Save enables you to save your changes to the line item and returns you to the Quotation.

Escalate Costs will escalate costs on the line item by a percentage.

Markup Selling price will change the selling price on the item to be a percentage more than the cost.

Description can be edited here to better qualify the detail of the item to be supplied.

Quantity will allow you to amend the quantity to provide.

Unit Cost will be set based on the price from the stock items weighted cost of this stock item.

Unit Sell will be set based on the sell price for the stock item based on the customers associated price list.

Working With Time, Travel and Expenses

From the Job Card selecting Time Travel and Expenses will open Time, Travel and expenses with a list of items you have already added. .

Selecting Add Time, Travel And Expenses button will launch the Time Travel and Expense Entry Form.

If you selected an entry from the existing list you can edit that item as it will show you the selected item for editing. Selecting Save will write away your changes.
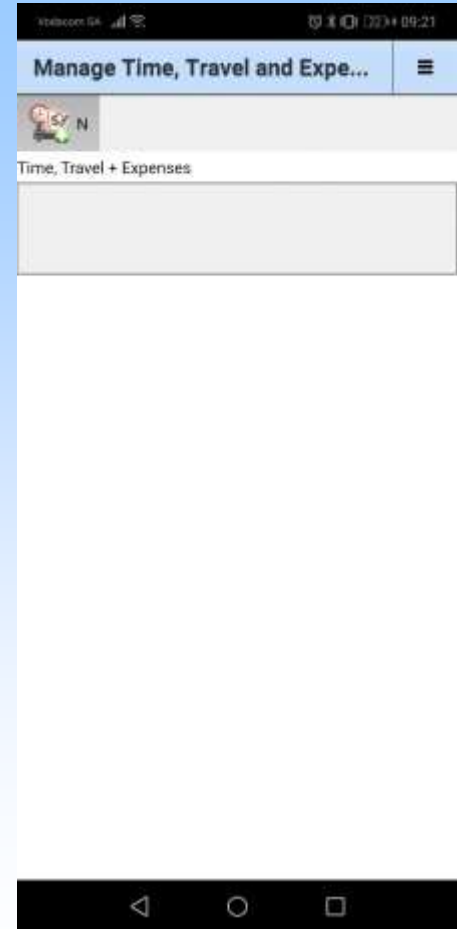
Adding or Editing Expenses

When you enter the form it defaults to Labour, you can click on Labour and change it to Travel or Materials. This affects the layout of the form.

Labour:
Capture the details, and edit the start and end times or just capture hours worked. The Time Category defaults to Normal Time, you can also specify whether the time is Overtime, Public Holiday Time or Sunday Time.

Travel:
Capture the details, date and the km's travelled.

Materials:
Capture the details of items purchased. You can edit the Purchase Date and capture the quantity and cost. The system will calculate the total cost automatically.

Back to Index

Search Knowledgebase Screen

From the Job Card View screen you can search your organisation's PFIM CMMS Knowledgebase. This can help with fault diagnosis.

When first opening knowledge the refresh will connect to the server and update your local knowledge with the server copy.

Serch for Category will provide a list of categories and enable you to only return results from a selected category.

Type in the term or word to search for and tap the Search button. A list of possible matches is displayed. To view the solution if it does not fit in the list select it. You will be presented with the problem and solution screen for the selected item.

Check In / Check Out

From the Job Card View screen you can select to Check in or check out.

Based on your device configuration will affect how this screen displays you may get a Snap Photo option first or a Waiting Location, at the top of the screen it will display how far you are with finding a location. We accept any reading under 20M or the best of the first10 readings.

After you have all required data Photo, Location you can Check in or Check out.

This enables the office to track Technician progress better.

Note: If images are used they will display on the map view, your organisation can decide if it should be a selfie onsite or a picture of the site.

Please note: At this stage a synch will loose all check in records from the device so you need to check in again before you can check out.

Job Card Signing

The Sign Button is hidden until all equipment linked to the jobcard has been serviced.

Tapping the Sign button on the bottom of the Job Card View screen will display the Job Card Print Name Pane selecting the pane will launch the keyboard or start drawing depending on your settings.
Capture the Customers name then SaveImage.or select Done on the keyboard

The System will now launch the Authorised Signature Pane, Sign and SaveImage.

Here you can get your customer to sign off the Job Card. Selecting 'Save Image' will store the Name and Signature in a hidden location on the local device. The name and signature will be uploaded to the PFIM CMMS installation the next time you sync.

At this time you should select Appointment Complete on the bottom of the job then select back and choose yes to save the jobcard.
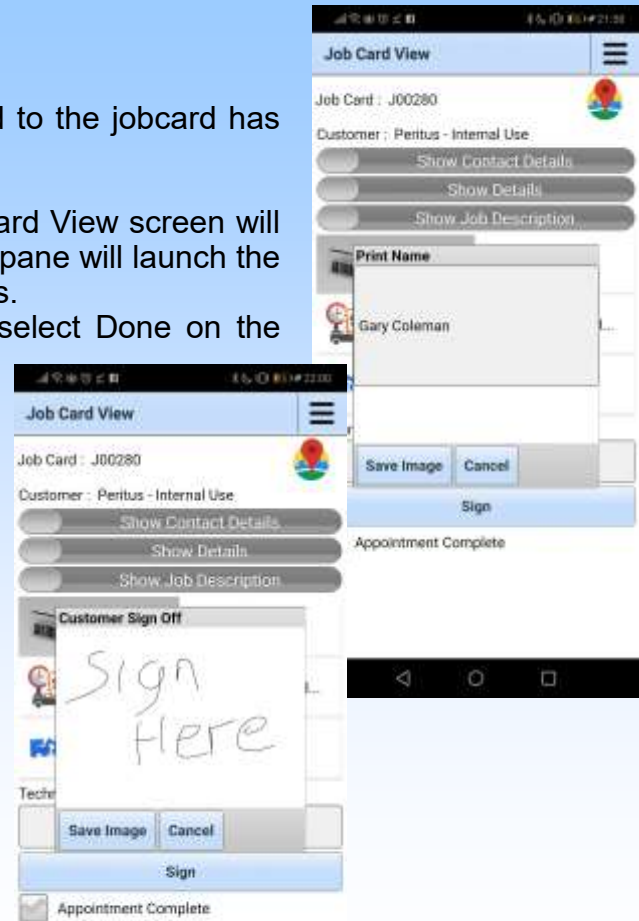
Create CallOut

Selecting the Create Callout option from the Job Card list screen opens the Log Callout screen.

This is similar to the Fault screen but will result in a JobCard that can be synched to your device and worked on immediately this is great for on Call or anytime the office is not manned.

The Customer must exist in order to log a callout.

Capture at least 2 characters of the Debtors name then select Search.

Clicking in the caller field will search for the contacts associated to this Debtor.

If the person that contacted you is not listed you can create them by selecting the add.

Create CallOut Continued

Selecting Add Contact will prompt you to complete a few items required by your Company complete and click OK.

If you are able to acquire a Purchase Order Number from your customer then enter it into the Purchase Order field.

Capture the details of the CallOut (what is needing to be done.)

Capture additional info regarding the exact location of the issue (Room number or relevant info).
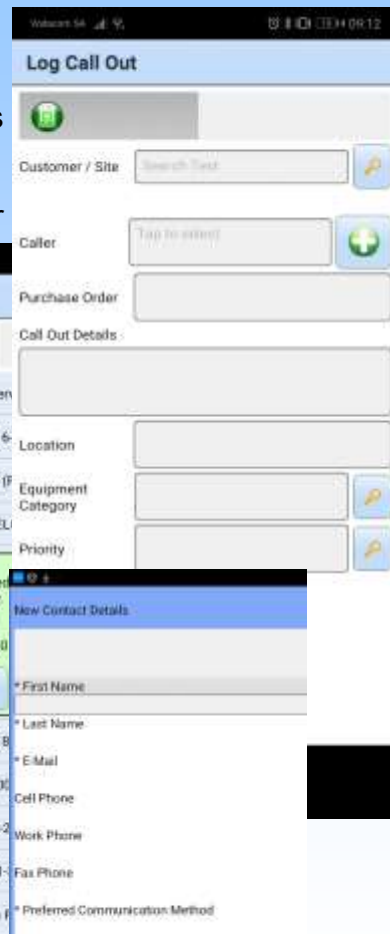
Use the Search buttons to get your organisations Categories and priorities.

Select save. This will create the CallOut and return you to the JobCard list displaying the CallOut reference number that can be supplied to the client if needed.

You will need to synchronize the device to get the new JobCard down.

NOTES

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About PFIM Mobi Screen

From the Main Menu - Menu screen you can select the About PFIM Mobi option and tap the OK button to display the About PFIM Mobi screen.

This will show you what version of the PFIM Mobi Application you are running. You also have the option of tapping the Check For Updates button which will connect to your organisation's PFIM CMMS server to check for a newer version of the application.

If a newer version is found it will automatically be downloaded onto your device using your web browser.
Note: Checking for Updates requires a connection to your organisation's PFIM CMMS installation and will use about 15 MB of data if an update is found and downloaded.

For further information please contact

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Back to Index