peritus business solutions
the home of PFIM software

PFIM MOBILE
workforce management

(How To Provision A Device)

Overview

The PFIM Mobile Application was developed to provide a means to incorporate an organisations 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 Application for Technicians provides a means to notify teams in the field of up-dates and changes to their workload and in turn allows them to update their progress and make use of the organisations investment in the PFIM Maintenance Management Solution via inquiries into the accumulated service history and knowledge base. We have also enabled the Technicians to be turned into Sales Reps providing the ability to generate Quotes and log Service Desk Calls.

Full Client

PFIM CMMS
maintenance management & monitoring

Mobile Application

Web Interface

One Database

Index

Features

Access to the program and the PFIM MMS system 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.

Job related data is stored on the device to enable the technician to perform routine maintenance without connectivity to the organisations PFIM MMS system.

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 Cards can be marked as complete by the technicians removing it from their workload and enabling the admin staff to proceed with invoicing of the work.

Faults that are detected during routine maintenance can be reported live from the PFIM Mobile Application allowing the technician or 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 organisations PFIM MMS system to record the condition and state of equipment for historic and reference purposes.

Data can be synchronised with the organisations PFIM MMS periodically and program updates can be installed when convenient to do so over wifi connections.

If the organisation maintains a knowledge base as part of their PFIM MMS system – this knowledge base will be searchable from the field via the PFIM Mobile Application.

Service history of units can be inquired into from the mobile devices running the PFIM Mobile Application for Technicians in order to get a better understanding of the nature of the equipment. Photographs that have been uploaded in the past can be viewed via the application.

Techincal Considerations and Minimum Device Specifications

In order for the PFIM Mobile Application for Technicians to perform optimally and in order to make use of various functionality in the program – certain minimum specifications need to be met by prospective devices.

Screen Size

While the application will probably operate on most screen sizes the rule of thumb is the bigger the better! Recommended screen resolution of 720 x 1280 (Samsung Galaxy S3) would be a recommended minimum. The physical size of the device is also important as the buttons will be smaller on devices with higher pixel densities. Technicians typically have large hands and therefore require larger devices. Working with Quotes is preferable on a larger screen.

Memory (RAM)

Depending on OS version and the type and number of applications that will be running at the same time we recommend at least 2GB RAM – again the more the merrier.

Storage

Storage requirements will vary depending on the number of Job Cards assigned to the technician and how many photos are retained on the device. Upwards of 250MB should be the minimum.

Camera

The camera quality is obviously important to the quality of photographs that are taken of equipment but also probably an equally important consideration is the ability to be able to accurately scan and identify barcodes. A 5Megapixel camera would be recommended if barcode scanning is a requirement – otherwise the customers required resolution of the photographs would dictate the specification of the camera. A flash is a very useful feature as equipment and barcodes can often be located in areas of low light.

Touch Sensitivity

If the signing feature a required feature then special consideration needs to be given to the touch sensitivity of the device. High resolution devices have often been found to have very poor touch sensitivity or are not able to detect handwriting very accurately. A stylus whether 3rd party or supplied with the device would be a necessity. ***Definitely test the device for compatibility with the stylus and handwriting*** if signing off of processes is required.

Connectivity

Connectivity is essential either via mobile network or wifi. Reliability over speed. Dependent on the volume of Job Cards assigned to a technician – the average Synch requires less than 300K of data. However checking service histories and uploading photos will utilise way more than this. Checking and downloading updates for the application will utilise around 12MB at this point in time.

Minimum OS Version

The PFIM Mobile Application For Technicians has been tested on versions of Android from Jelly Bean (v4.1) and later up to Lollipop (v5.1). We are able to build for iOS – please enquire should this be a necessity.

Play Store

In the case of devices where the Android version of the application is to be deployed – the presence of the Play Store application by Google is required. Certain requirements like the Barcode scanning application are sourced from there. While it may be possible to source these from else where having to do so will certainly add to deployment time and stability / reliability of the device and PFIM Mobile Application for technicians deployment.

Provisioning a device for use with the PFIM Mobile Application For technicians

Ensure that the device complies with the minimum requirements as specified in the Techincal Considerations and Minimum Device Specifications section of this document specifically as regards the customers requirements and expectations of the system.

Enable connectivity to the internet – preferrably via wifi as 100 MB data may be required.

Ensure that the device has access to the Google Play Store (as per requirements doc) – this may require creating a Google Account.

Create The Technician

Create the Technician in The PFIM Service Desk

Create the Technician as a Contact in the PFIM Service Desk. Make a note of the Technicians ContactID in the service desk. Ensure that the contact is ticked on as a Technician. In the Technician Tab enter the technicians user name and password. These MUST be EXACTLY the same as they are entered in PFIM full client user access.

Create the Technician as a user in PFIM full client

Create the Technician as a user in PFIM full client and enable access to Job Cards.

Create the Technician in the Fault Report System

Create the Technician in the Fault Report System (Fault Report Technicians) in PFIM full client and enter the ContactID obtained while creating the technician as a contact in the PFIM Service desk.

Enable Installation From Unknown Sources

In Settings Security you need to Enable installing applications from untrusted sources (this is necessary until the PFIM Mobile App is available on Play Store).

Install Barcode Scanner

Install the Open Source Barcode scanning application for Android from Zxing. Search for barcode scanner on Play Store.

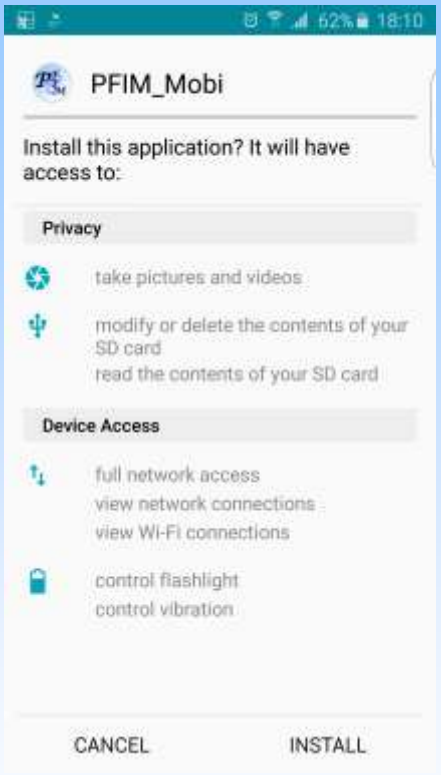
Install PFIM Mobile Application For Technicians

Download the PFIM_Mobi.apk file using whatever means you prefer – on the memory card (SD Card), copied onto the device via the USB cable, downloaded using a browser etc.
To Download from the Peritus Website open the Scanner and Scan this QR Code then open in Browser.
Or Use this Link:
http://www.peritus.co.za/PFIMUpdates/PFIM_v5/PFIM_Mobi.apk

Once it is on the device you need to open the .apk file (use a file manager – ES File Explorer can be found on Play Store if the device does not have a File manager) – the system will ask you how you want to open it – select Android Installer or Package Installer depending on the prompt.

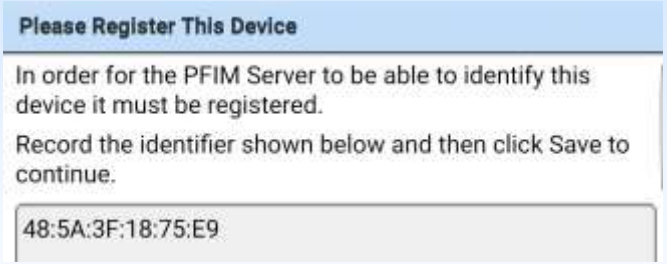
Approve The Android Access Rights

Agree to the requirements that PFIM Mobile Application has in order to complete the installation. For Lollipop and later FIM Mobile Application does not need access to run at startup.



Please Register This Device

Once the application is installed launch it for the first time. The Device UUID will be displayed – CLICK Save!



Edit Configuration Screen

On first launch the Edit Configuration screen will be presented.

Use the Scan Barcode button to configure from your company barcode or Enter a Configuration Name – this can be anything that is meaningful – the name of the PFIM customer would be a good choice.

The Configuration URL must be the address (URL) to the PFIM MMS system from the internet. The address therefore has to be resolvable via DNS from the device(s). Anything following the address must be a valid and meaningful path to the web server and must be where the PFIM MMS system resides – the same URL to reach the Service Desk from outside (excluding the document name eg. index.html)

When you click Save you will be presented with the Sign In screen.

Sign In Screen

At the Sign In screen enter the technicians User ID as configured in the PFIM Service Desk. Enter the Password as configured in the PFIM Service Desk. The User ID and Password are CASE SENSITIVE so they must be entered correctly!

At the first login the PFIM Mobile Application for Technicians MUST have connectivity to the organisations PFIM MMS system. A profile is created on the device for this link after successful authentication with the server. If not provisioned it will display the UUID, follow instructions on next page to provision.

If successful you will be presented with the Synchronisation screen.

Provision The Device
In The PFIM Service Desk

In the PFIM Service Desk menu under System Configuration → Configure Mobile Integration → Provision Devices.
Ensure that the device is listed and that the correct Device UUID is registered here and that it is Enabled.
The Device UUID **MUST** be entered **EXACTLY** as displayed on the device. After an attempted login this can be found in the Failed Mobile Logins ordered by Date, ypi can copy and paste the UUID portion from here

Do not forget to activate the devices by clicking Enabled and then Save Changes.

Data Synch Screen

The first time that you arrive at this screen if your device has never been Synchronised before it will state so otherwise it will have last synch date and time simply proceed as normal by tapping the Refresh button (a connection to your organisations PFIM MMS is required)

It is necessary to have a connection to the organisations PFIM MMS system in order for this action to be performed.

To Synchronise tap the Refresh button.

A timer or hourglass will display while the application sends it will display orange while sending then green while receiving. Once the process is complete the timer or hourglass will disappear and a popup will inform you of completion.

To continue tap OK on the message.

If recently synchronized tap the Main Menu button at the bottom of the screen to bypass the synch.

About PFIM Mobi Screen

From the Main Menu - Select the About PFIM Mobi option to display the About PFIM Mobi screen.

This will show you the server you are connected to, the user you are logged in as and 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 organisations PFIM MMS server to check for a newer version of the application.

If a newer version is found it will automatically launch you browser and download the update to your device. Opening the download will commence the upgrade

NB Checking for Updates requires a connection to your organisations PFIM MMS System and will use more than 12 MB of data if an update is found and downloaded.

For further information please contact

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