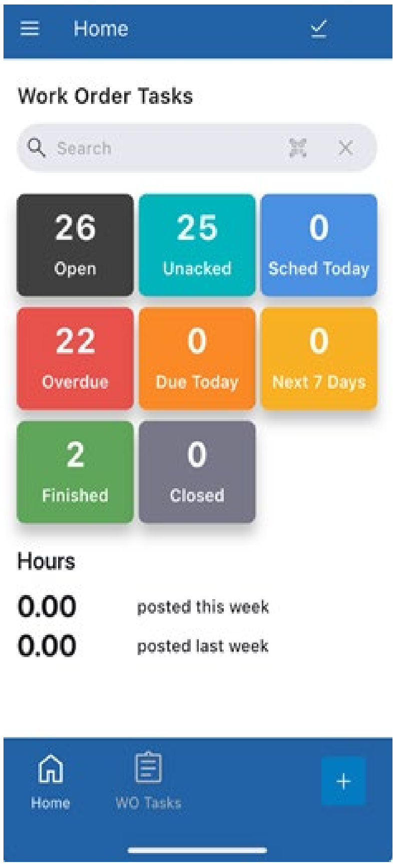
WebTMA Mobile Overview



The WebTMA Mobile application gives Technicians a way to quickly review their assigned tasks, add non-work time, enter the time and costs, and mark the work as finished.

Work is listed by Task, and the application allows use of the microphone on the mobile device to dictate comments.

A Search feature offers numerous Search Options to refine the search. An extensive set of filters is available from any list of Tasks. Most quick Filter buttons are the same as the tiles on the Home Page.

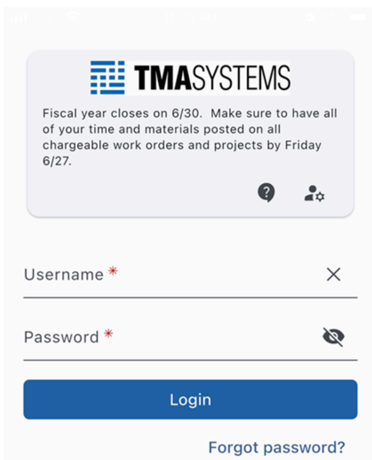
You can work both online and Offline depending on the strength of the connection.

Technician Access

Unlike the GO mobile products, the permissions applicable to users of the WebTMA mobile app are assigned from *Admin > User Management > Records / Window Access* Tab.

An exception is in the case of a 1:1 match for settings in the *User Management > Records / Preferences Tab / Preferences* or *Privileges* sections compared to the *Mobile Access-Mobile Preferences* section. These settings apply to the WebTMA mobile app user as well. Otherwise, only users of the GO products have settings made on the *Mobile Access* Tab.

Login



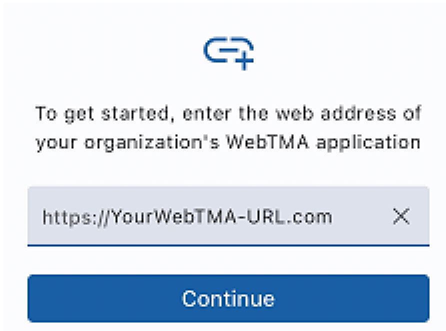
Your organization's system administrator provides you with a *Username* and *Password* as well as a web address to successfully log in to WebTMA Mobile. Your Password is needed each time you log in.

Web Address

The first time you log in, you need to enter a web address. Once saved, it does not have to be re-entered.

To open the web address window:

1. Tap the  photo icon on the *Login* page.
2. Enter the URL.

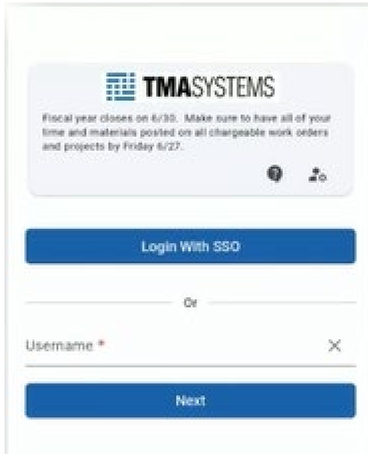


3. Tap *Continue* to return to the *Login* page.

Contact Support

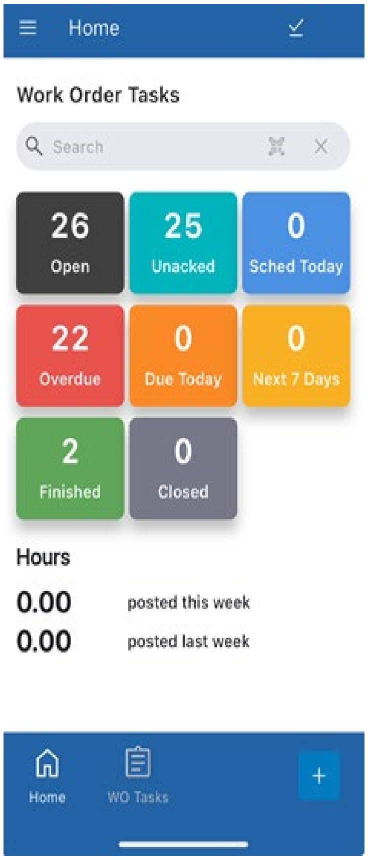
Support is available by email and phone. On the *Login* page, tap the question mark icon to see the support address and phone number for your organization.

Login with SSO



If your organization uses SSO for login, you see the Login With SSO button on the login page.

Home Page



The WebTMA Mobile *Home* page gives you at-a-glance information about Tasks and posted Labor.

Tap any tile to see a list of the tasks in that category. To see all open Work Orders, tap the *Open* tile or the *WO Tasks* 

icon on the Taskbar at the bottom of the window.

Taskbar

Use the *Home* icon to return to the Home page from any page you have open.

Tap the *WO Tasks* icon to open the *Work Order Tasks* window and view all open Tasks. When the icon is dimmed, it is enabled.

Press the *Plus* icon to open a *Create Work Order* page.

Title Bar

In addition to identifying the name of the window or the Work Order number, two icons are generally available on the Title bar:

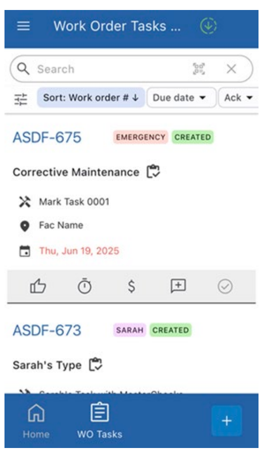
When available, the Back Arrow returns to the previous window.

The Hamburger icon opens a vertical menu with access to other windows such as Work Order Tasks and Non-Work Time as well as the *About* window and to *Log Out*. It also identifies the person who is logged in to this mobile session.

Offline indicator

Sync indicator

Work Order Tasks Window



The *Search* field at the top of the window and the affiliated buttons and icon below it allow you to sort the list in many ways. See Search Options for descriptions of each selection.

You can take several actions from this window using the icons below each Task entry.

Acknowledge you have received or reviewed the Task with a single tap on this icon. When tapped, the icon looks like this . The acknowledgment is sent to the main application.

Press the Timer icon to start timing your work. This feature is available from the list of Tasks as illustrated here or from the Task details window. Tapping this icon opens the Task Details window.

$ Tap the dollar sign to open the Costs page for the Task.

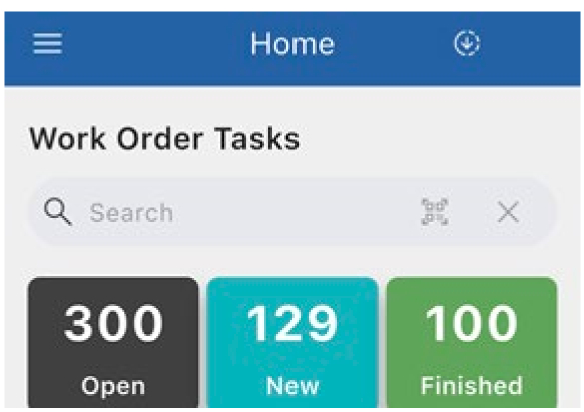
Use this icon to open the Comments page for the Task.

Tap for a shortcut to the Finish Task screen. This is useful when Labor time must be added to a Work Order Task before it can be marked as finished. The icon is only enabled when required.

You can also tap the entry on the *Work Order Tasks* window to review the details of the Task. Related Task Tabs are visible on the Task Details window.

Search Options

Home Window Search



The *Search* field on the Home page is an easy way to search for records by:

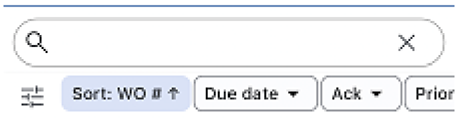
- Work Order Number

- Task Code
- Word or character string such as Task name

If you know a partial number or name, you can enter those in the Home page *Search* field to quickly locate the needed record.

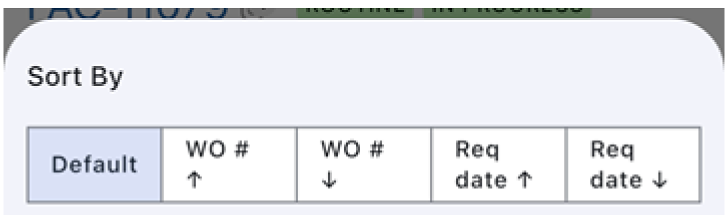
Note the icon. Tap it to scan bar codes.

Tasks Window Search



At the top of the *Work Order Tasks* window, the *Search* field and related buttons can be used to filter your search of the Task list. If you know some or part of the related Work Order number, you can enter it in the field.

Tap a button to see options at the bottom of the window. The following is an example of the *Sort* options:



Filters Window

Scroll across to see the *All Search Options* icon for a list of all filters available. As illustrated below, the list is long. Scroll down to see all selection options.

Use this window to select as many filters as needed to reduce the list size and find the needed record. To see your changes, tap the *Done* button.

To restore the list, select *Clear*.

Search Buttons

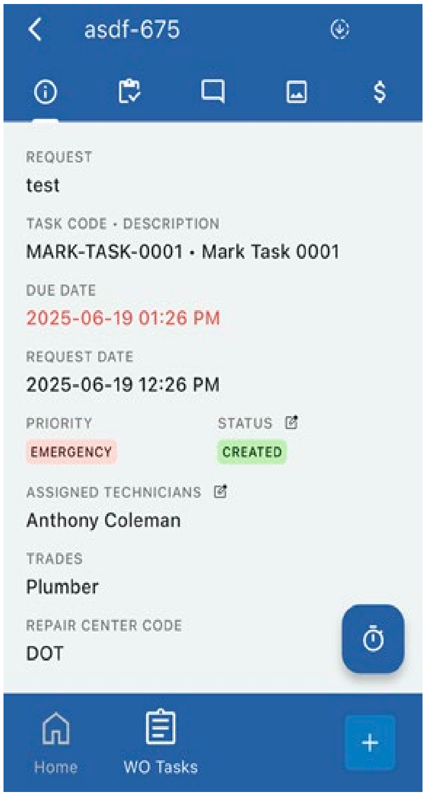
You can tap the related buttons that are displayed under the *Search* field itself to see results by an individual category. As you scroll through the buttons horizontally, you can select additional buttons to reduce the list.

Each time you tap a button, the related options display at the bottom of the screen. Make your selection and press *Done*. You can continue to select other buttons to reduce the list further. Activated buttons are indicated by the change in color.

To remove a selection, tap the button once more and select *Clear*.

If you want to apply several filters at one time, using the Filters Window is faster.

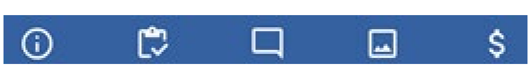
Task Details



The *Task Details* window opens when you tap the Task entry on the *Work Order Tasks* window or tap the *Timer*  icon.

On the window, scroll down for details such as the *Tag #* and *Requestor*. In addition, use the [Task Tabs](#task-tabs) at the top of the *Task Details* window for more information and actions. The timer icon is also available  at the lower right of the window. Tap to start the Timer. Your time is reflected at the bottom of the window with both Pause and End Timer buttons as illustrated below.

Task Tabs



The Tabs at the top of the *Task Details* window represent the following:

- Identity Tab with Task details
- Task Check List if available (see Task Check List Tab)
- Comments (see Task Comments Tab)
- Linked Documents (see Linked Documents Tab)
- Costs - Labor, Other Charge, and Material (Costs Tab)

Tap an icon to open a Tab.

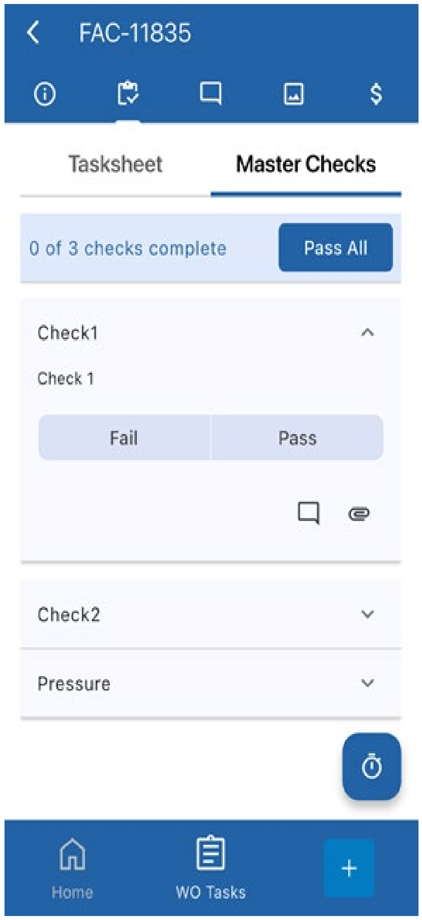
Task Check List Tab

If the assigned Task includes a list of checks or procedures, tap the icon to review it.

Master Checks

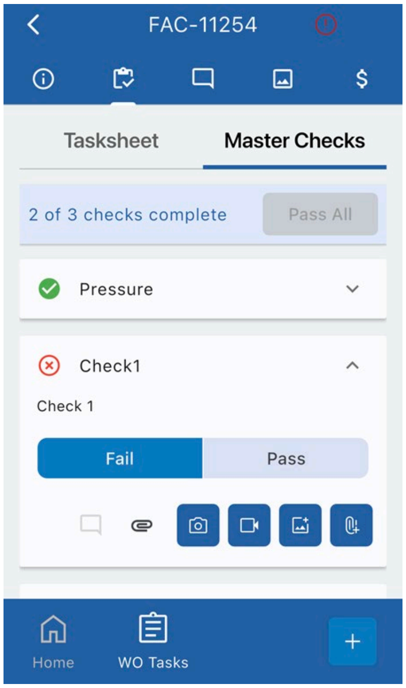
You can also add results to Master Checks from this Tab. Master checks require your input such as Pass, Fail, and values (such as meter readings).

Tap *Master Checks* on the window to see the checks.



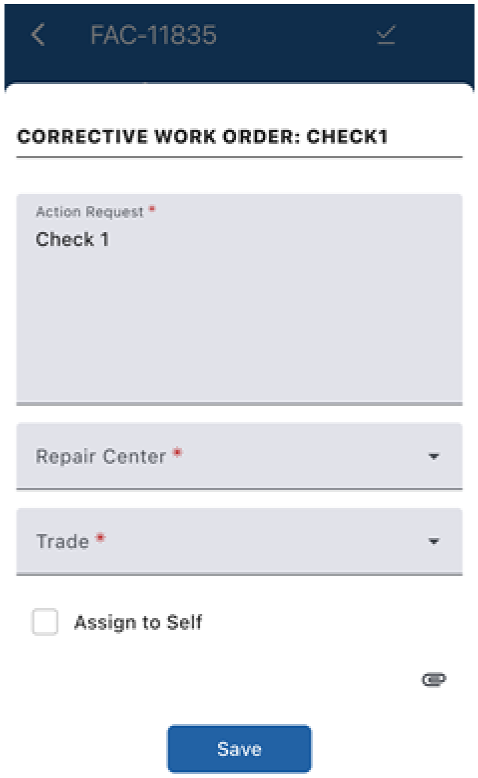
You have the option to tap the *Pass All* button to mark all checks as Pass. If readings are required, the application alerts you.

You can also open each check to tap Pass or Fail. If marked as Fail, a Corrective Work Order window can open to accept comments as well as photos and attachments if the check has been designated for Corrective WO.



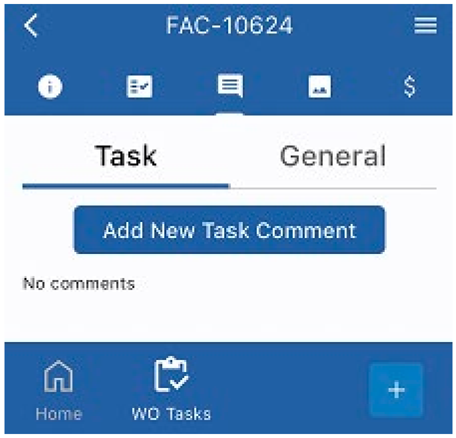
Use the icons to take a photo, make a video, attach an existing photo, or attach a document file.

Corrective Work Order



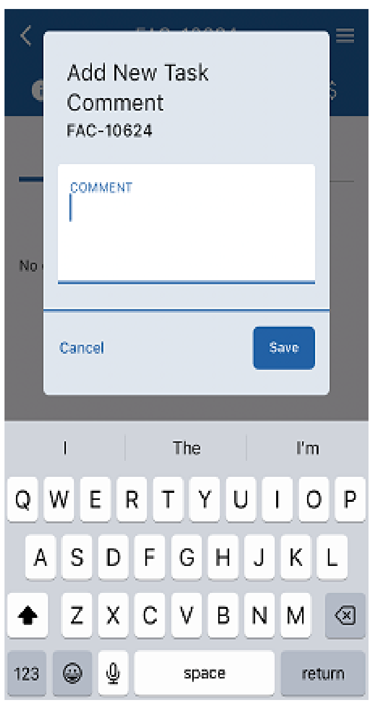
Master Checks can also trigger a corrective Work Order if *Create Corrective WO* is marked on the original Master Check record. If a check is eligible, the *Corrective Work Order* page opens when a check is failed. Only the action needed, Repair Center, and Trade are required. Technicians have the option to mark the *Assign to Self* check box if appropriate.

Task Comments Tab



You have the option of typing or dictating both *Task* and *General* Comments.

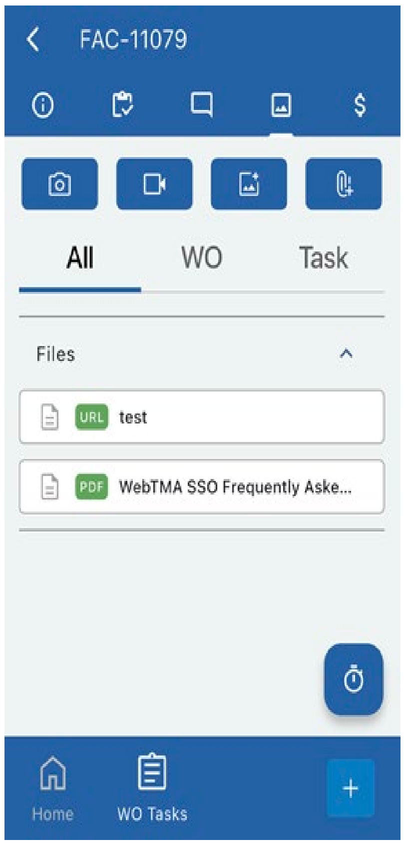
1. Tap the *Comments*  icon to open the *Comments* Tab.
2. Select the heading you want: *Task* or *General*.
3. Tap the *Add New Task Comment* button.



4. Enter your comment.

5. (Optional) Tap the microphone icon to dictate your comments.
6. Select *Save*.

Linked Documents Tab



Tap the *Linked Documents* icon to do any of the following from the mobile device:

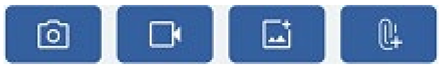
- take photos
- record video
- review linked documents
- upload graphics or documents

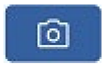
Note that WebTMA Mobile has a 10 MB file size limit on uploads.

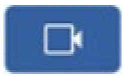
Use the headings (*All*, *Task*, and *WO*) to view the files by category.

If you tap Task, you may find that none of the visible files are linked to the Task itself. Tap WO to see linked files attached to the Work Order record.

Attach Files



 Tap this icon to open the camera on your device and take a photo.

 This icon opens the video application on your device.

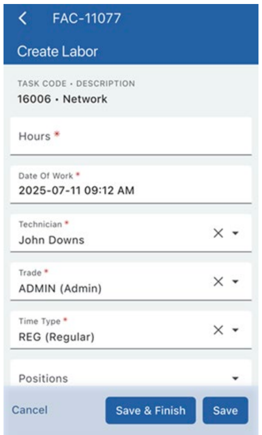
 Use to locate and upload documents from your device.

 Select to attach documents to the Work Order from your device.

Costs Tab

Tap the $ *Costs* icon to add Labor costs as well as Materials or Other Charges.

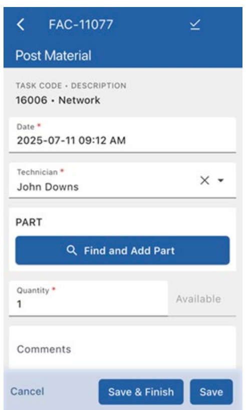
Post Labor



Complete the required fields and scroll down to add Comments.

You have the option to *Save* or *Save & Finish* the Task.

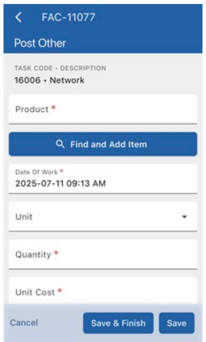
Post Materials



If connected to the internet, you can search for a part in stock. You can also enter the part name manually or using dictation. Scroll down to add Comments if needed.

You have the option to *Save* or *Save & Finish* the Task.

Post Other Charge



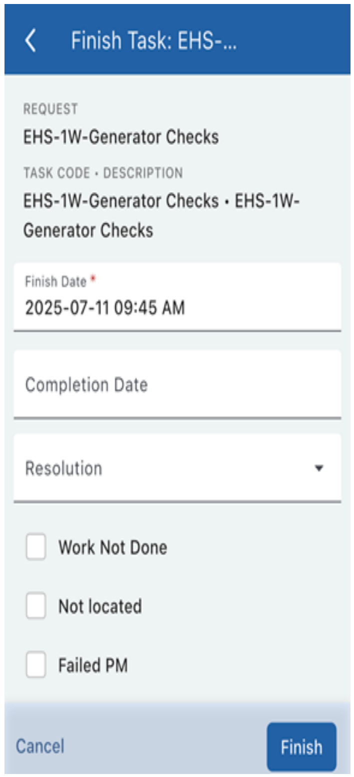
Enter the *Product* name and other required information. The *Unit* field is not required and is only used when the Other Charge relates to time spent rather than a physical item.

Scroll down to add *Comments* if needed.

Note that an Invoice number is required regardless of the *Charge Type* selected.

You have the option to *Save* or *Save & Finish* the Task.

Finish Task



When you tap the *Costs* icon to add Labor, you also have the option to mark the Task as finished.

Tap the *Finish* button on the window or the *Save & Finish* button on any of the Cost entry windows. Either button opens the *Finish Task* window.

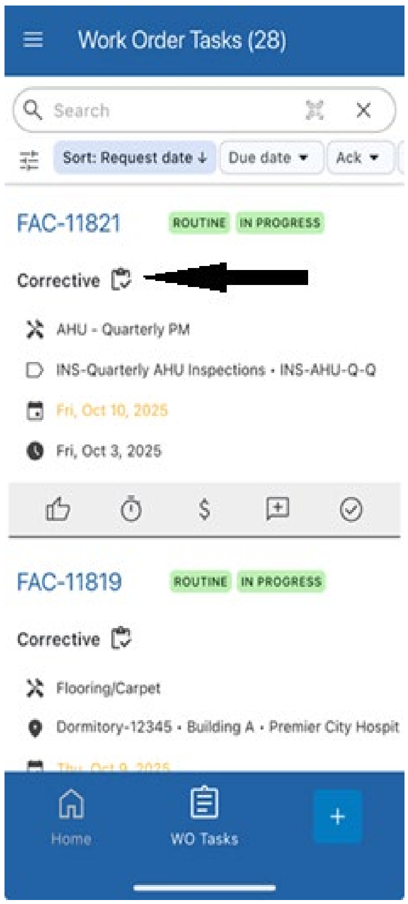
Scroll down to add needed details.

NOTE: If you have saved costs from the related windows and tap the *Finish Task* button, the *Finish Task* window includes all the related costs.

General Inspections

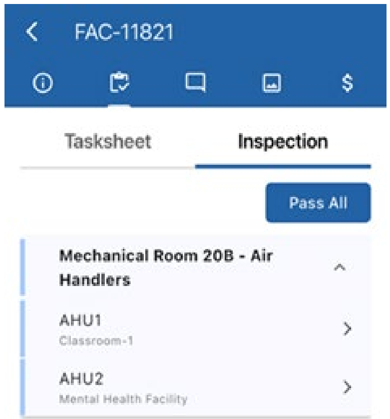
If your organization uses the optional General Inspections module, it gives you a way to confirm completion of Tasks for each maintenance-worthy item on a list and to generate Work Orders for failed checks.

Work Order Tasks Page Check Icon

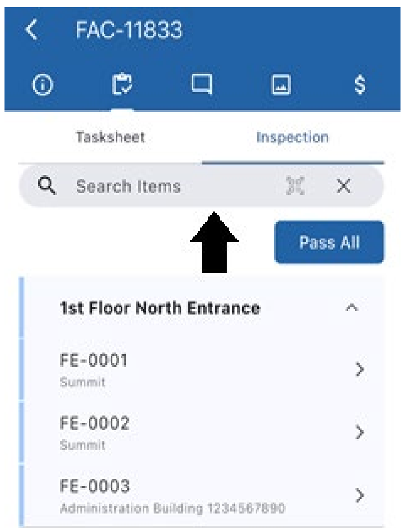


The Work Order Tasks list indicates when a check list is present. This applies to both Master Checks as well a General Inspection checks.

Tap the icon to open the *Task Check List* Tab showing the *Inspection* Sections list.

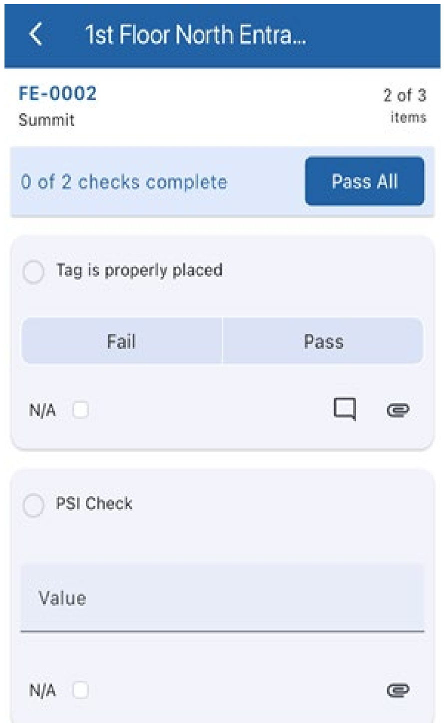


If the Section list is long, you can swipe down to reveal a search field to locate a particular item by matching text in the Tag Number or Location.



View Checks

Tap a line to view the list of checks that apply to that maintenance-worthy item.



Once you have complete all the checks for an Item, you can swipe left or right to move forward or backward through the list of Checks instead of returning to the Sections/Items screen.

Note that the checks can include icons  at the right of the line. The first is included when you are to add comments.

Tap the paper clip to expand for more icons as illustrated below.

Use these icons to take a photo or video, insert an existing photo, or attach a file. When you attach a file from a Check, it is attached to the current Work Order. If used on the Corrective Work Order, the file is attached to both the current and new Work Order.

Mark Check Items

Depending on the type of check, you have the option to:

Fail or **Pass**

Note that Checks cannot be modified once they are marked as *Fail* and have a Corrective Work Order created.

Add **Comments**

Include a **Value**, such as a meter reading:

If the control is configured for Meter with Digits, the field accepts numeric-only input and the number of digits that can be entered is restricted. If a Pass/Fail + Input check has upper and/or lower limits set, the only entry required is the Value. Based on the limits, the system will mark the check as Pass or Fail.

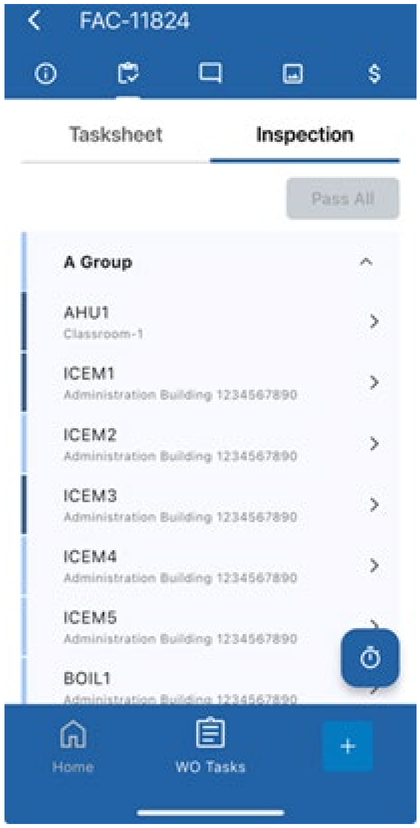
When more than one of these options is part of the Check, all requirements, such as Pass/Fail + Input, must be entered to be deemed Complete.

When available, the *Pass All* 

button on the Section list is visible. This applies to all unset Pass/Fail checks for all items being inspected and should **only be used with extreme caution**.

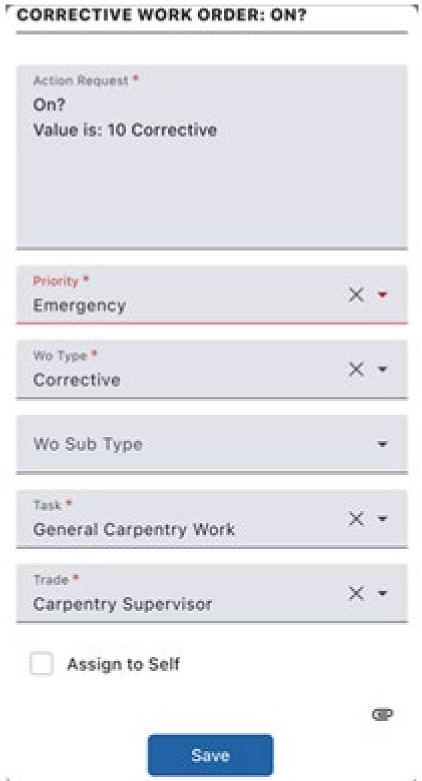
The *Pass All* button on the maintenance-worthy item view, applies only to the Checks for that Item, and only to those checks that are configured as Pass/Fail and have not been set as Pass, Fail, or N/A.

Track Completed Checks



When the list of checks is long, you may not finish all at one time. When you look at the list of checks, you can see light and dark colors on the vertical line at the left of the list. Dark blue indicates that all children are complete. When looking at an item, dark blue tells you that all its checks are complete. When looking at a Section, you see dark blue when all Checks of all Items are complete.

Failed Checks



When an item is marked as failed, the app opens a *Corrective Work Order* window.

Your system administrator usually sets default for the fields, but you can also make selections from the drop-down lists for the required fields.

Technicians can mark the *Assign to Self* check box when appropriate.

Offline

If you are in an area with no connectivity, you can perform many functions offline.

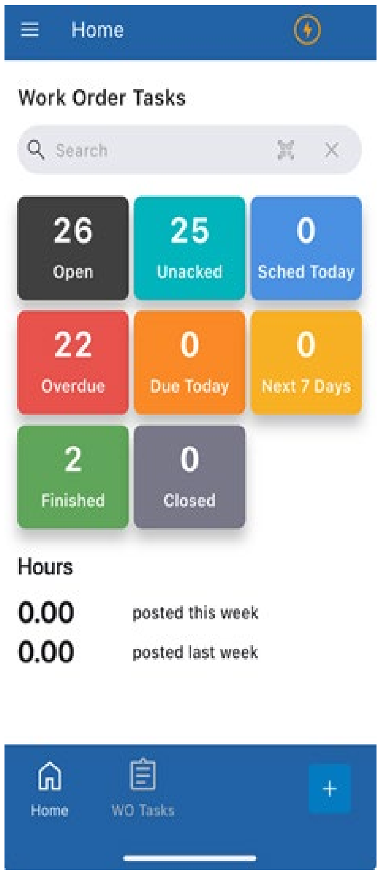
The app saves your entries when you save the following actions while offline:

- Create a Work Order

- Post Labor
- Post Material
- Post Other

Once you are back online, the queued records are uploaded and can be manually removed from your Sync queue by swiping left and deleting.

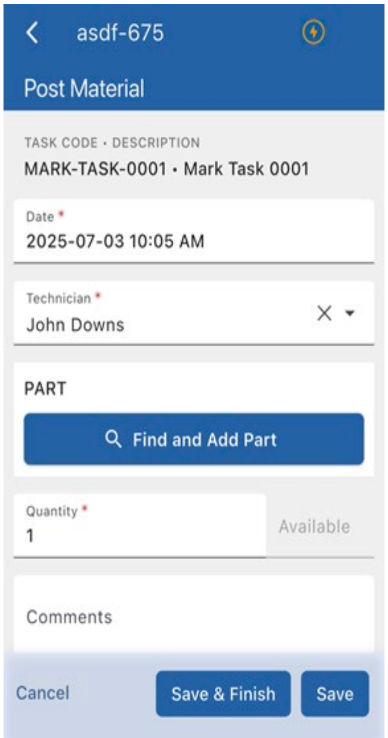
Offline Indicators



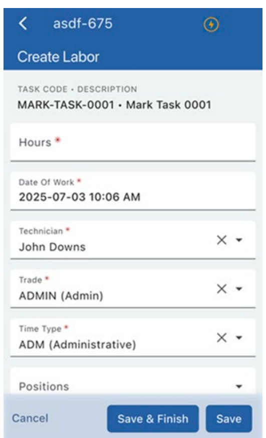
Look for the orange circle  with a lightning bolt in the title bar that indicates that you are offline.

On some pages, a short note alerts that you are working offline.

Enter Parts and Labor Offline

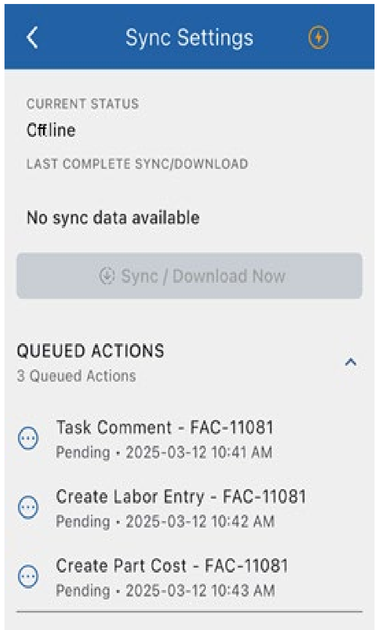


The app accepts a part number you enter. If it is incorrect, you are alerted on the queued Actions.



You can enter hours and comments on the *Create Labor* window. In addition, you can Post Other items in the same way.

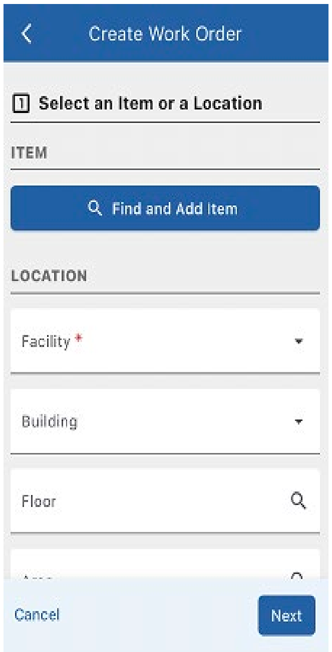
View Queued Actions



Tap the orange circle icon to see a list of items waiting to be uploaded. You can also tap the hamburger icon and tap *Sync Settings* to review the list.

While offline, you can delete lines in case of error. Once uploaded, swipe left to manually delete the lines.

Create Work Order



To submit a Work Order, tap the Plus  icon on the task bar at the bottom of most windows.

Enter the details as well as attach images or documents in the window that opens.

1. Select an Item or Location (required). If you select an Item, the Location fields are completed.
2. Tap the *Next* button.
3. Complete the *Work Order Details* page.
4. Tap the *Next* button.
5. Complete the *Task Info* page.
6. Tap the *Next* button.
7. (Optional) Attach any images or files.
8. Tap the *Submit* button.

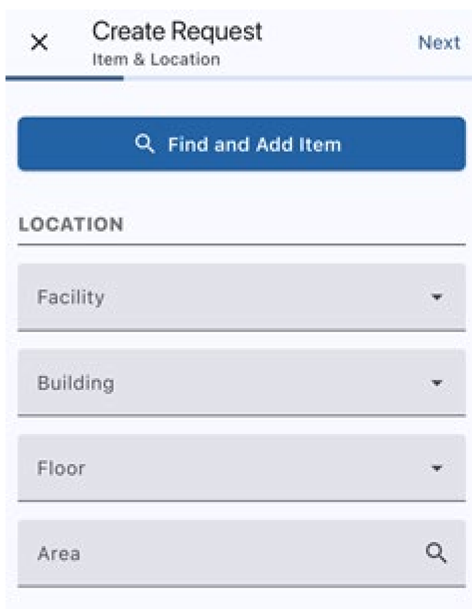
Your Work Order is sent to the main application.

Create Request

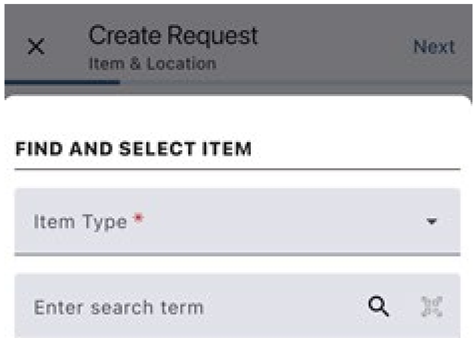
When you notice something in need of repair, tap the *Plus* icon on the task bar at the bottom of most windows. On the drop-down menu, select *Create Request* to open the first of several windows where you can add the needed information as well as images or documents.

NOTE: Create Request cannot be used unless ADD permission is granted on the *Window Access* Tab for *Transactions-Request log* (*Admin > User Management > Records / Window Access* Tab).

Create Request - Location

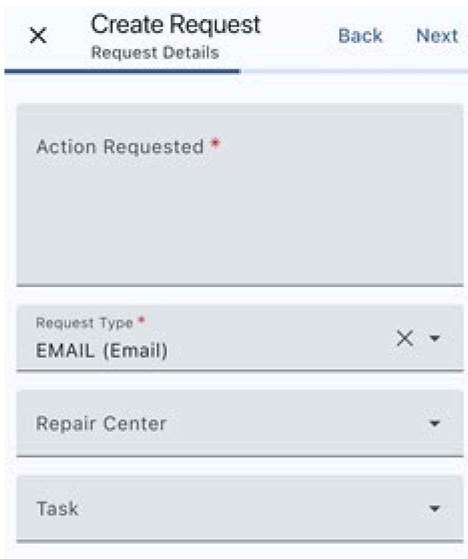


This first page is used to enter the Location. If the Request concerns a specific Item, you can tap the *Find and Add Item* button at the top of the window to select an item.

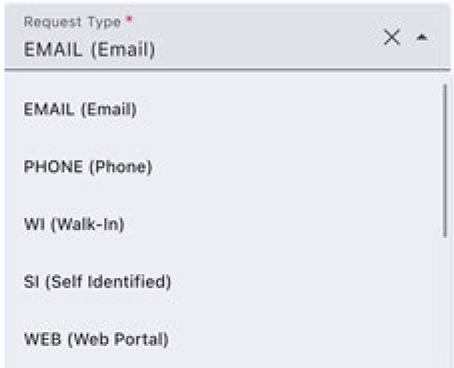


Use of the *Find and Select Item* window is not required. Tap *Next* at the upper right to open the page where you enter the requested action.

Create Request - Action



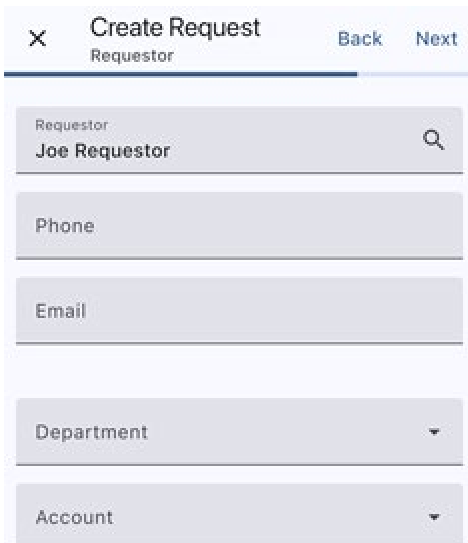
Enter the work to be done in the *Action Requested* field. Note this field is required. Then select the *Request Type*, which is also required. Notice the *Request Type* menu has several options including *Self Identified*.



You can add other information if available such as Repair Center or Task to be performed if needed.

Tap *Next* to select the Requestor information.

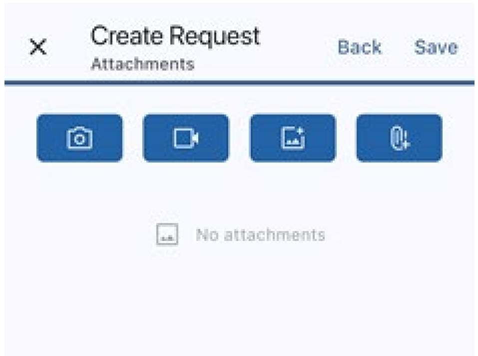
Create Request - Requestor



Use this page to identify the person who made this request. If the name you select has associated contact and other information, it will display automatically.

Tap *Next* once again.

Create Requestor - Save



The final page in the Create Request sequence allows you to attach documents or video if needed and save the request.

Tap *Save* at the upper right to complete the Request record.

Your request is uploaded when your device syncs with the database.

About Window

The WebTMA Mobile *About* window identifies the *Version* of the application you are using as well as the *Client* name and URL.