

Overview

AwareManager Mobile for iOS allows users to access the information in their organization’s database using mobile devices such as the iPad, iPhone, and iPod Touch.

The app can be downloaded from the iPhone app store, after which it becomes available from the phone’s Application Menu.

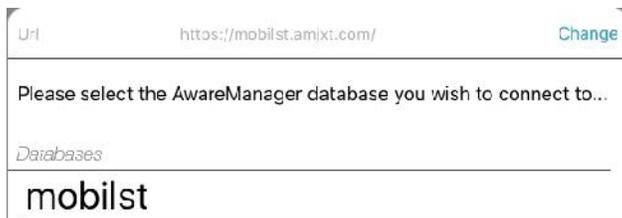
This document details the Work-related components of the application.

System Requirements

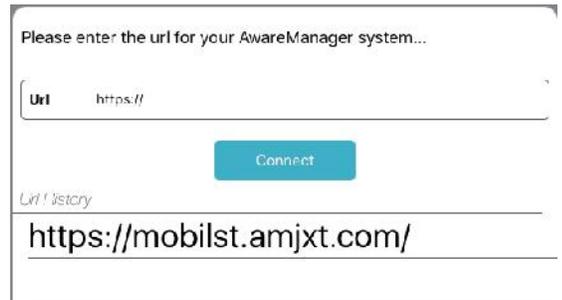
- Mobile data or Wi-Fi connection
- iPhone 4 or higher, iPad 3 or higher, latest iPod Touch generation
- AwareManager Suite 68.3 or higher

Log In

Enter your URL into the address field and press “Connect”, or select an address from the URL History.

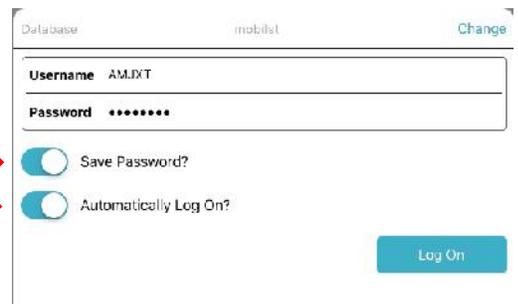


Tap to select your database from the list.



Enter your username and password into the given fields.

Stores your password against the username → Save Password?
Automatically signs you in when you open the app → Automatically Log On?

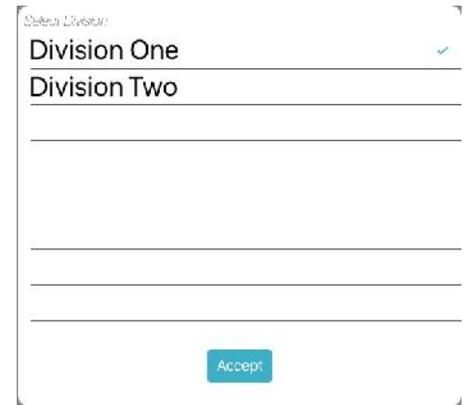


If you are not the only one using the device, you should not save your password or activate the automatic sign-in feature. This will allow anyone else using the device to access the system under your name.

Divisions

If you have access to multiple divisions, you will be prompted to choose the division you want to work in upon logging in. The divisions available to you will appear in a scrollable list. Move the highlight to the desired division and press **Accept**.

If you were already accessing a division, pressing **Cancel** will return you to that division.



Home

From the Home screen, you will see the following options:

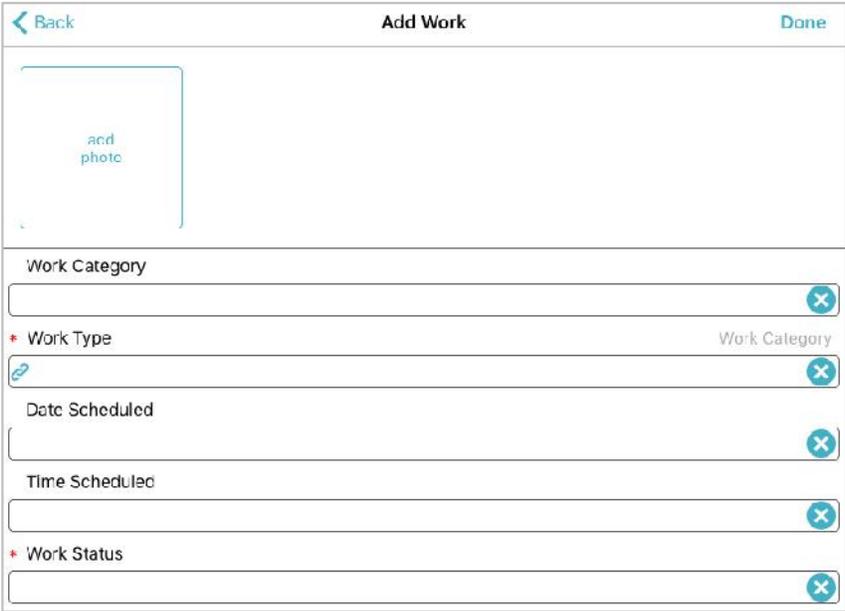
-  **Add Work**
-  **Work Search**
-  **Scan Search**
-  **Inspections**

At the bottom of each screen, you will see the following options:

- **Online indicator** – Indicates your current state of connectivity. It will display “Online” in green if you are connected to a network. It will display “Offline” in red text if the device lost connectivity, or “Offline” in red text with a white background if the app was manually set to *Lock Offline* mode
- **Queue** – Click on this to view the list of updated items that are to be uploaded – or are in the process of being uploaded - to your database. See **Offline Mode** (pg 12) for more details.
- **Timer** – This will indicate when the timer is active as part of adding time
- **Menu** – You will have the following options:
 - **Lock Offline** – Select this if you want to force the app into offline mode. This is ideal if you plan on performing work that requires you to go to locations with spotty connectivity; this way you can just force the offline mode for the duration of the work instead of dealing with intermittent connectivity.
 - **Settings** – See **Settings** (pg 13) for more details
 - **Log Off** – Select this option to log off the app

Add Work

Pressing this button will take you to the Add Work screen. The fields you see are based on your system setup; contact your system administrator if you have any questions.



Add one or more photos to the record →

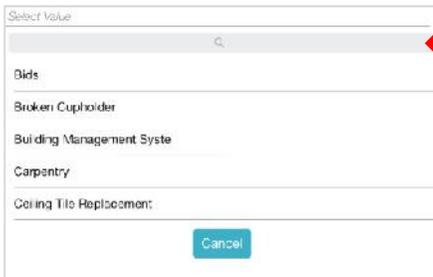
Indicates a constrained field e.g. Work Type is constrained by Work Category →

← **Save the Work record**

← **Press anywhere on a field to input a value.**
Press 'X' to clear out the value

When you click on a field, the way you enter a value depends on its type:

Linked field



← **Enter text in this field to filter your list**

Free-form Field



Date selector



Time selector



Add Photo

From this screen you can also add images to your Work record.

Pressing on the **add photo** button at the top of the screen will open up a menu that gives you the following options:

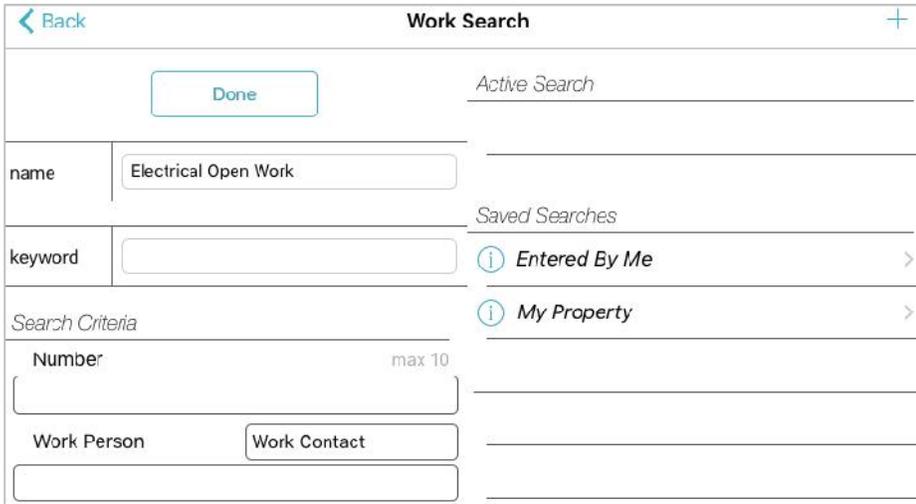
- **Take Photo** - opens your device camera to take a picture. When you take a picture you will have the option to save it or discard it and take a new one
- **Choose Photo** - Allows you to select an image from your device (stored under Moments, Camera Roll, My Computer, etc.) You must select one photo at a time
- **Cancel** – returns you to the entry screen

Any pictures added will appear as thumbnails. If you are on an iPhone or iPod, once at least one picture is added, a **Back** button will appear on the left (opposite the **Cancel** button) for you to return to the Work record.

Work Search

From this screen you can start a new Work search or open a previously saved search.

Saved searches will either be cloud-based or user-defined.



Cloud-based searches will appear at the top of your Saved Searches list in italics. These have been predefined by a system administrator and cannot be edited or deleted via the app.

User-defined searches can be defined directly from the app and are saved against the current device for the current user. They will be listed below the cloud-based searches in regular font.

Click on any Saved Search to re-run it.

Click on the (i) next to a saved search to view/edit its criteria

Add New Search

Press the + icon in the top right corner to add a new user-defined search.

You can type any phrase into the *Keyword* field to search by within all fields.

In the *Search Criteria* section, you will see all fields currently available for you to search on (e.g. *Assigned To*, *Work Status*, and *Work Type*). You may tap in any field to specify criteria for it. To remove a field from your list, swipe right on it and press the **Delete** button that appears.

You may search on a range of values for the same field. To do this, tap the area labeled “Add search criteria” and select the field again. It will appear below any existing fields of the same name. Once the field has been added, tap anywhere in that field to set a value.

Entering a name in the *Search Name* field will automatically save the search in your Saved Searches list when you press **Done**. The app will run the newly saved search and take you to the resulting Work List. Alternately, you may press **Done** without adding a name; the search will display as *Temporary Search*.

To delete a user-defined saved search, swipe left on it to bring up the **Delete** button.



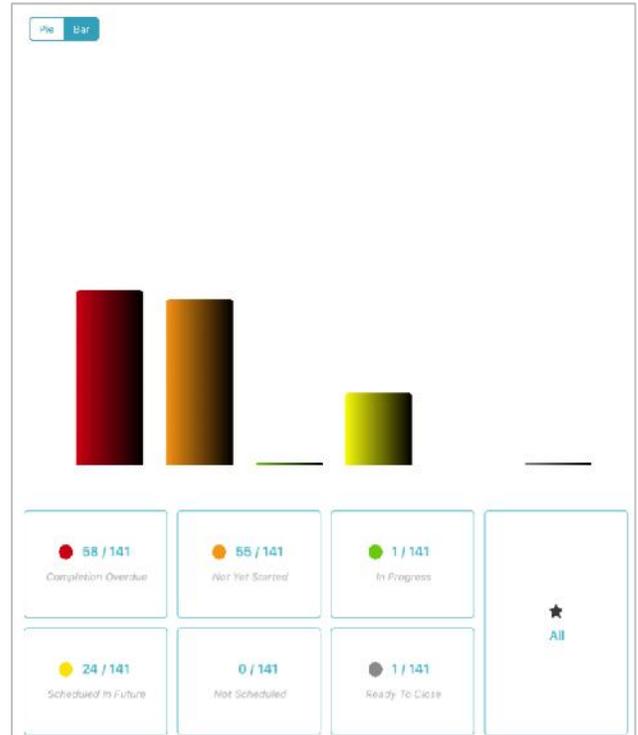
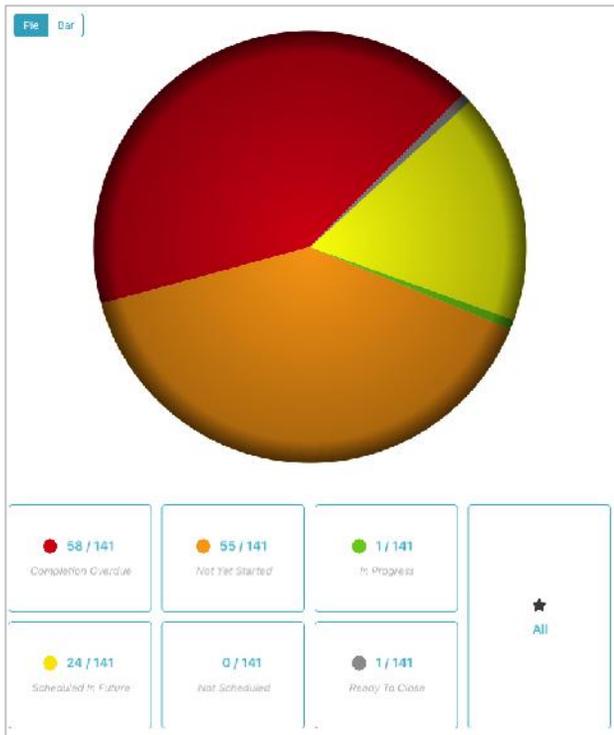
To edit a user-defined saved search, click on the (i) icon next to it to bring up the saved search criteria. Make any modifications and press **Done** to save your changes. If you just modified your current search, you will need to select it again to re-run it with the revised criteria.

Work List

The results screen displays your search results. Depending on your settings, you will see these results in one of two ways:

Status Control Panel

If this feature is enabled as part of your AwareManager JXT settings, your results will initially be represented in this format. The color indicators are the same as in JXT.



For more on the Status Control Panel, contact your Client Manager.

Click on any of the buttons at the bottom of the screen to be taken to the Work records indicated, or press **All** to see all results.

Work List

If your Status Control Panel is not enabled, you will instead be taken directly to the full list of search results. From this screen you can:

Go back to Search → **Back**

Perform a scan to filter the current Work List (See Scan Search for more details) → **Equipment**

Select a record to view more details → **16-0035931**

Edit the selected Work record → **Edit**

Menu options include:

- Add Work
- Take Photo
- Choose Photo
- Add Time
- Manage Materials
- Material Summary Report
- Email Work

Equipment	Unit	Tasks (2)	Readings (25)	Files (8)
16-0035931 PM Inspection PM Inspection	Open 1st Floor	Time (11)	Materials (4)	Asset (1)
16-0035932 PM Inspection PM Inspection	Open Global Unit 1MT	Work Person Jeff Conors	Tenant AwareManager	

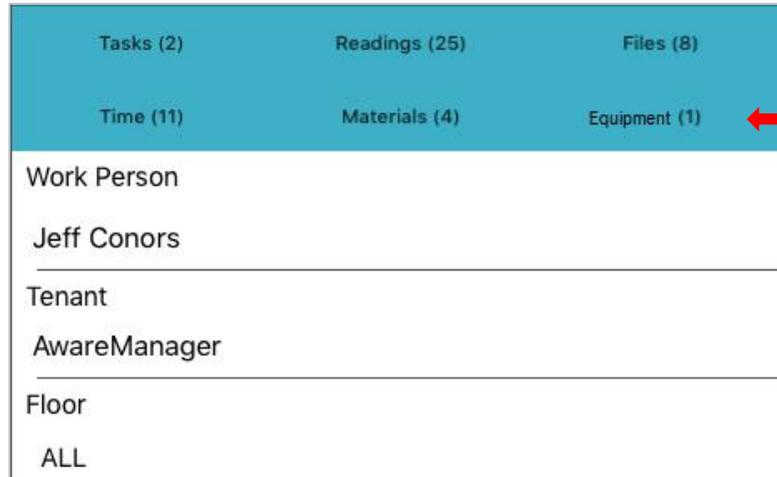
View Work

This screen displays the details of the selected Work record. It will either appear in a separate screen on iPhone/iPod devices, or next to the Work List on iPads.

Click on any icon to view/add the corresponding records.

A number indicates that there are already values linked

Click on the *Description* or *Notes* (or any multiline text fields) to view them in full

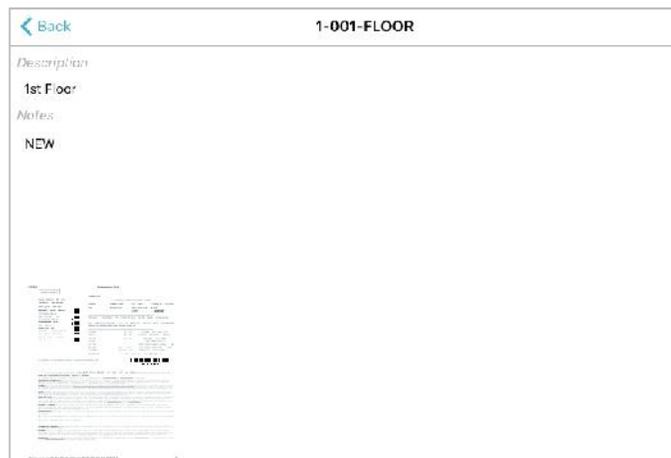


Click on Equipment to display details for the piece of Equipment linked to the Work record

Equipment Details

This tab will have information if the selected Work has an Equipment record explicitly linked to it.

Clicking on this icon will display the following details for the linked Equipment: *Code, Description, Property, Unit, Floor, Room, Manufacturer, Model Number, Serial Number, Work Notes* as well as any linked files. Click on any files to view them in full.



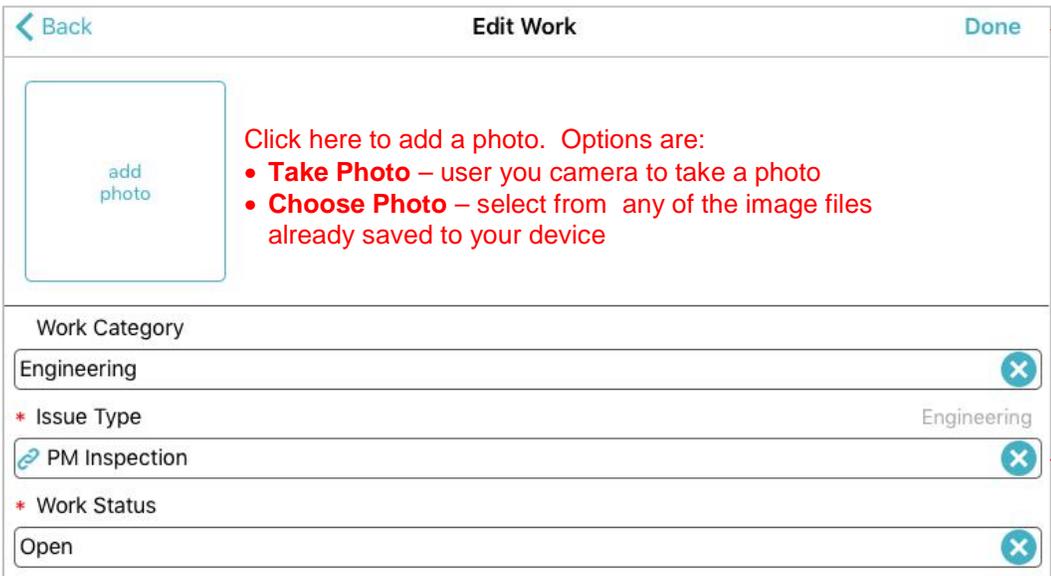
Unit Details

This icon will only appear if you perform a Unit scan, either via Scan Search or filtering a Work List by a Unit scan.

Clicking on this icon will display details for the linked Unit: *Code, Description, Notes* as well as any linked files. Click on any files to view them in full.

Edit Work

You can access this screen by pressing the **Edit** option above the record in View mode. It will bring up the Edit view defined for the selected Work record.



Click here to add a photo. Options are:

- **Take Photo** – user you camera to take a photo
- **Choose Photo** – select from any of the image files already saved to your device

Click in any field to define its value

Press 'Done' to save your changes

Press 'X' to clear the field

Tasks

This screen displays each Task linked to the selected Work record. For each task, it will display the following:

- General Notes – click on this link to display the *Notes* defined for the given task. Clicking on the text again will hide it
- Instruction Checklists – For each instruction listed, you can check it off and/or enter *Notes*. There will be a color indicator at the top of the screen corresponding to the items to be checked off. It will display as red if no items are checked off, yellow if at least one item has been checked off, and green once all have been checked.

For each item checked off, the corresponding Instructions will populate in Aware with the current user logged in, the date/time the task was checked, and any notes entered.



16-0035936

12-8 CHECK

These are the Notes, not the Instructions:...

Status ● Check All

General Notes

Instruction 1 - Details Notes

Instruction 2 - Details Notes

Instruction 3 - Details Notes

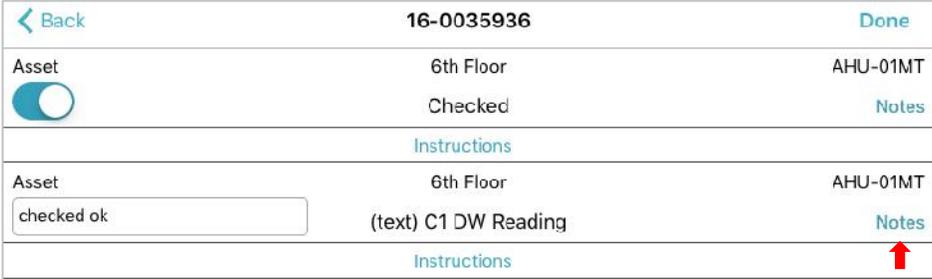
Readings

You can access this screen by clicking on the **Readings** icon at the top of the selected Work record. Note you can only edit readings if they are already linked to the Work; you cannot add new readings from the app.

From the Readings view, press **Edit** in the top right corner to update the readings.

Press 'Done' to save your changes

Click in each value field to add/edit it



Click on the *Instructions* field to view additional instructions for completing the reading. Click anywhere on the pop-up to close it.

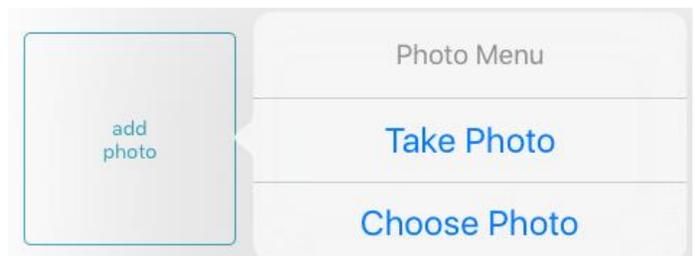
Click on the *Notes* field to add/edit this value

Files / Add Photos

You can access this screen by going to **Menu > Take/Choose Photo** or by clicking on the **Files** icon at the top of the selected Work record.

Selecting **Take Photo** will initiate your device camera. Once you take a picture, you will be prompted to either save it against the Work record or discard and retake the picture.

Selecting **Choose Photo** will open up a list of images directories to choose from. Navigate until you find the image you want, and select it.



You may repeat this process for as many images as you want to add to the Work record.

Email Work

This feature will only work if you have an email account associated with your device.

Selecting this option will open your device's default email client and create a new outgoing email. The body of the email will populate with all of the details available in the current user's View mode. In addition, any linked images will be embedded at the end of the email. You must select one or more recipients to send the email to.

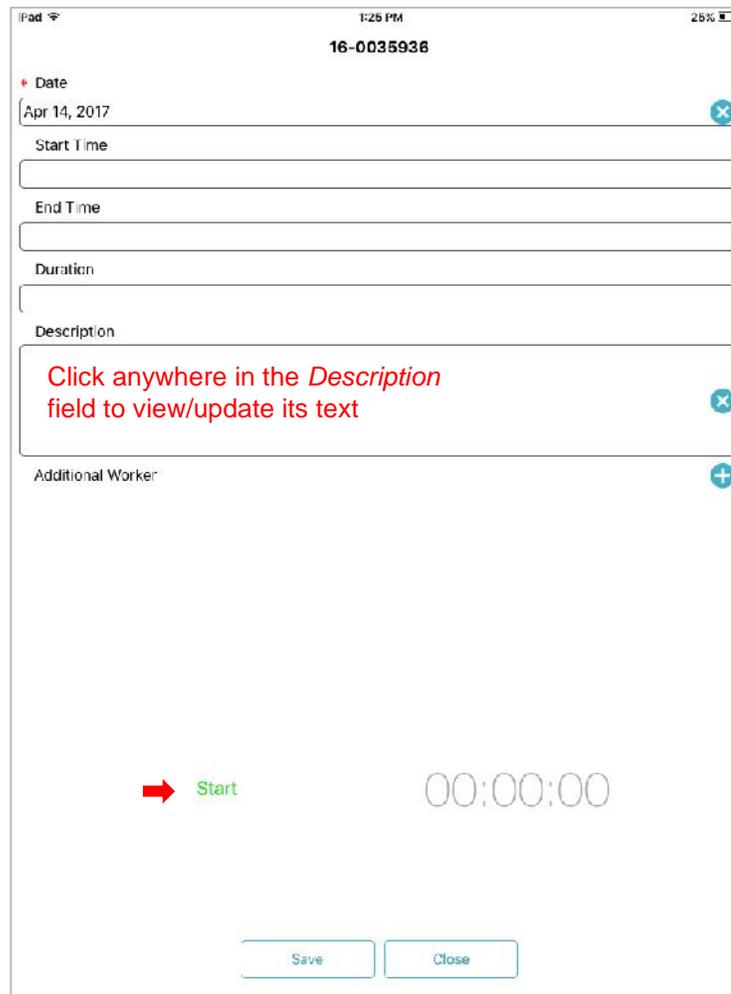
Note: The email history will be stored in your email client, not in the AwareManager app.

Time

You can access this screen by going to **Menu > Add Time**, or by clicking on the Time icon above the selected Work record and pressing “+” in the top right corner of the Time List.

Note you can add time details in one of 3 ways:

1. **Manual entry** – Click in the *Start* or *Finish Time* fields for the current time to populate, and then manually adjust the other value. The *Duration* will automatically calculate.
2. **Duration default** - This method assumes you are finishing at the current time. Click in the *Duration* field to enter a value. The *Start* and *Finish Times* will adjust to account for this duration, with the *Finish Time* populating as the current time. Changes to the *Duration* value will cause the *Start Time* to adjust.
3. **Use the timer** – Press **Start** at the bottom of the screen to start the timer. You may leave this screen and perform other actions in the system. Click on the “Timer” link at the bottom of any screen to return to the active timer and press **Finish** to stop it. The *Duration* will populate based on the timer.



Press 'X' to clear any field

Press '+' to add additional contacts. A separate Time record will be created for each additional person listed here.

Press 'Start' to initiate the timer.

Changes to "Stop" once the timer is running.

Press 'Save' to save your changes, 'Close' to cancel out.

If you have the timer running, you can press Close to return to the Work view and keep the timer running in the background.

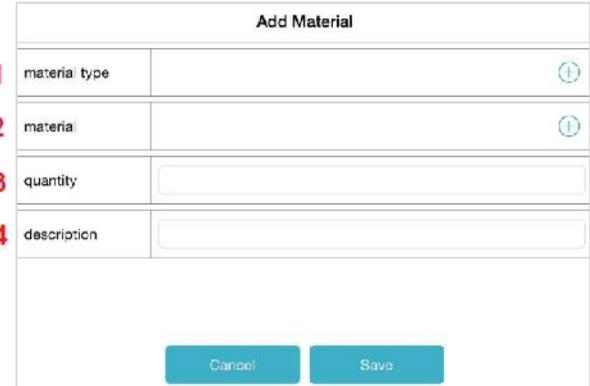
Materials

You can access this screen by going to **Menu > Manage Materials**, or by clicking on the Materials icon above the selected Work record.

For each material linked to the record, you will see its *Mobile Text*, *Description*, and *Quantity*.

Press the **Add materials** link at the bottom of the list to add new materials:

1. *Material Type* – select this value to constrain the *Material* list
2. *Material* – choose from the list of available materials. You should select a material if your organization is tracking inventory
3. *Quantity* – enter the quantity of materials you will be using; this field is mandatory
4. *Description* – you may leave this blank if you have selected a *Material* value, otherwise if you have not linked a material this field is mandatory



Pressing **Edit** in the top right corner will take you into Edit mode. From here you update the existing list as follows:

1. Click in the *Quantity* field to edit its value
2. Click on the *Description* link to update this value
3. Swipe left on any detail line to see an option to **Delete** the material. If you select this option, you will be prompted to confirm you want to delete the material



Material Summary Report

This report, accessible from the menu icon from the Work List, is based on all of the materials linked to the Work records displayed. The intention is to provide a list of all materials needed for your current shift's work, so that you can gather them all at once.

Materials are grouped by Material Type (with non-linked records displayed at the top).

For each material, it displays the *Material*, *Description*, and *Quantity*.

Note the same materials across multiple Work records are not combined; they are listed separately to account for any differences in *Description* between Work.

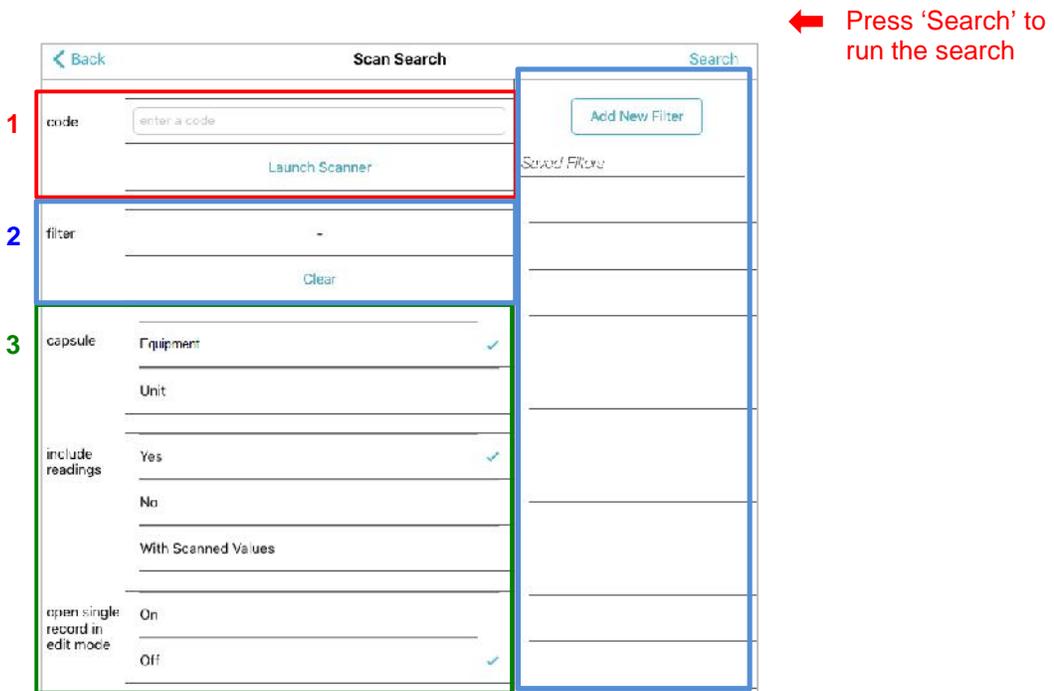
Material Summary Report		
Material	Description	Quantity
BeltsMT		
BELTS A-36	BELTS A-36	2.0
Other		
Services	Services	1.0
Services	Services	2.0
Tape		
Tape 1	Services	1.0
Valve		
Shutoff	Services	3.0

Scan Search

Scan Search Screen

This option allows you to access Work linked to a scanned Equipment or Unit using the following options:

1. **Scan fields** – you can enter a value in the *code* field or press **Launch Scanner** to initiate your device’s scanner. The scanned value will populate in the *code* field.
2. **Work Filters** – You can create a new filter or choose from the list of Saved Filters to apply to your search. (Filters are created the same way as Saved Searches – see *Work Search* above.) Any Work records linked to the scanned entity will be further constrained by the selected filter.
3. **Options** – For each search you can select the following options:
 - *Capsule* – choose whether you are scanning a piece of Equipment or a Unit
 - *Include readings*
 - i. *Yes* = Include Work with readings linked to the scanned entity; display all readings
 - ii. *No* = Do not include Work with readings linked to the scanned entity; only include Work records explicitly linked to the scanned entity
 - iii. *With Scanned Values* = Include Work with readings linked to the scanned entity, but only display those readings linked to the scanned entity
 - *Open single record in edit mode* – if only one record was returned, take the user directly to the Edit screen for that record



Work List Filter

Alternately, if you are viewing the Work List you will notice an Equipment and Unit tab above the results. Press either to initiate the scanner for that entity. The app will search the current Work List for a match against the scan, and return those results.



Inspections

This mode is ideal for updating readings on Work records, particularly those with large quantities of readings.

Once selected, you will be prompted to perform a search to bring up a list of records; see the section above on **Search** mode for more details on adding/accessing saved searches.

The results will be returned in a list view with an Inspection mode selector at the top. Depending on your access, you may see either (or both) options:

- **All** – Displays all readings for the selected Work record
- **Filtered** – Prompts you to filter the readings displayed for the selected Work record either by barcode scan or list selection



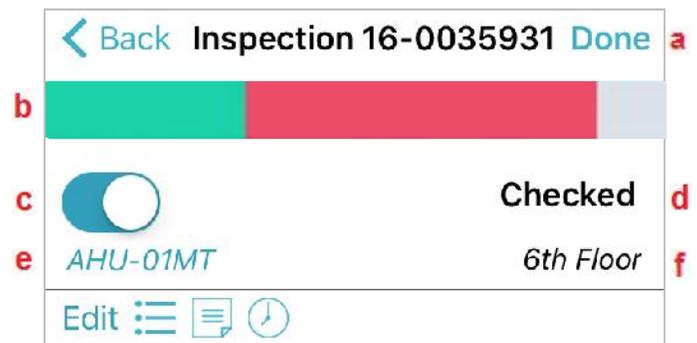
Once the mode is selected, click on any Work record to open it up in that mode.

All Readings

The readings linked to the selected record will be displayed in a list view with the following features:

- a. Complete the record – see **Completing Work** below
- b. Progress bar – gives a visual indicator of the number of readings completed:
 - Green = # readings with a value filled in
 - Red = # readings with no value filled in
 - Gray = checkboxes (indeterminate whether the reading is completed or not)

Click on any color to see a view-only list of readings Meeting the given criteria



- c. *Value* – click in this field to edit the reading within the list view
- d. *Reading Title*
- e. *Linked entity* – the entity (usually Equipment or Unit) linked to the reading. You can click on this value to view details about the entity. In the case of Equipment, you may also edit select values on the record.
- f. *Linked entity location* – if an Equipment is linked to a reading, the location stored for it will appear to the right
- g. *Edit* – click on this icon to view/edit the reading in detail mode. From here, you can use the arrows at the bottom of the screen to jump between readings one at a time or press **Back** to return to the list view.
- h. *Instructions* – click on this link to expand any instructions entered against the reading. Click on it again to contract the instructions.
- i. *Notes* – click on this icon to view/edit the reading Notes
- j. *History* – click on this icon to view the last 5 readings for the current reading/entity combination. History will be displayed in chart format for numerical data and as a table for all other formats. Click on the icon again to contract the history.

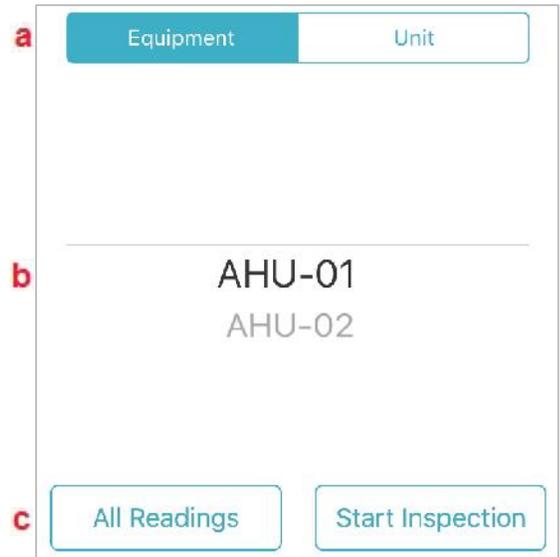
Filtered Readings

When this mode is selected, before viewing the Readings list you will be prompted to first filter the list by its linked entity.

- a. *Entity* – select the entity (Equipment or Unit) you are scanning
- b. *Scan* – if this is enabled, your device will automatically go into scanner mode. Focus any barcode in view and as soon as the device detects it, it will perform a lookup

Alternatively, if scanning is not an option, you may instead see a spinner displaying all entities linked to the selected Work record's readings. Select a value from the list and then press **Start Inspection** (not pictured)

- c. **All Readings** – press this if you do not wish to further constrain the list of readings linked to the selected Work record
Note: If you do not see this button but would like a "Show All" option, contact your system administrator



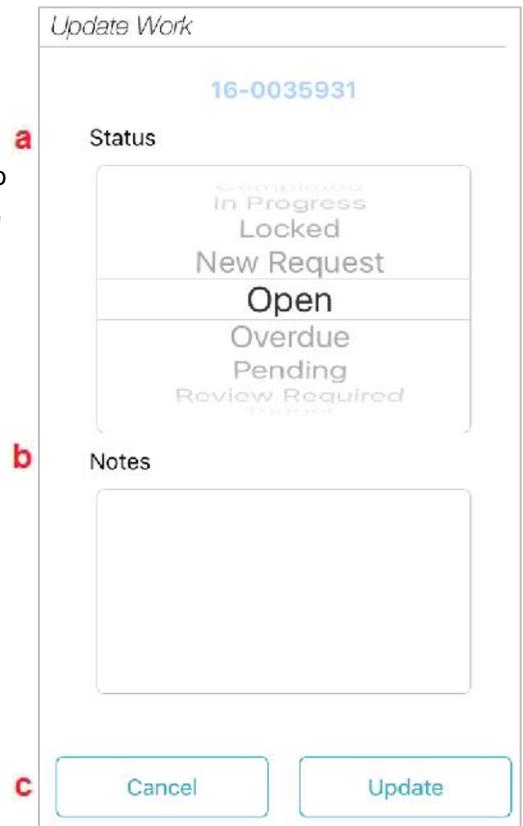
The readings list returned will be filtered based on the criteria submitted via this screen. Once you are done editing the list of readings, press **Back** to return to the Filter screen.

Completing Work

When you select the **Done** option in the top right corner of the Readings list, you will be prompted to complete the current Work record.

If there are unfilled readings, you will first be asked to confirm that you want to complete the Work record even with those readings unfilled. If you select **No**, you will be returned to the current view. Otherwise, pressing **Yes** will open a window in which you can update basic Work details:

- a. *Status* – select the appropriate status from the list of available statuses
- b. *Notes* – enter any notes as needed
- c. Press **Update** to save your changes, or **Cancel** to return to the Reading list.



Readings Detail view

When viewing the reading list on a tablet or clicking Edit on a reading in list view, you will see the following details:

Return to list

Instructions

Entity Type

Entity location
(Equipment only)

Reading History

Reading title

← Back
currency
Done →

Instructions
Currency mobile instructions

Equipment

AHU-01MT

6th Floor

\$ 4.50

Notes

Reading Value

Reading Notes

History

⏪
12/25
⏩

Update/complete the Work record

Reading Entity

If an Equipment or Unit record is linked, you can click on the name to view and edit its details

← AwareManager

ASSET
FILES

Code
AHU-01 (AHU-01MT)

Description
AHU-01

Property 1 WTC	Unit 6th Floor
Floor Flr 6	Room Rm 6
Manufacturer TRANE	
Model Number 12345	Serial Number 12345-0061A
Work Notes	

Click on the arrow to switch between Chart and Table View (where applicable)

Use the arrows to navigate back and forth between readings

Offline / Lock Offline Mode

If your device has lost connectivity to your AwareManager database, or you manually select *Menu > Lock Offline*, the application will go into Offline Mode.

This will be indicated by an “Offline” notice in the bottom left corner of all screens. During this time, you will only be able to access the results of your last search. Any changes made to these records (or any new records added) will be stored in a Queue. Once connectivity is restored, all updates will automatically be uploaded to the database.

Note: If you manually select Lock Offline mode, the device will not automatically reconnect. You must go to **Menu > Unlock Offline** for the device to try to reconnect to a network.



The Queue will indicate how many updates it contains; click here to view the list of items in the Queue.

Changes to a Work record are grouped as one item; changes to linked Time, Files, or Readings are represented as individual items.

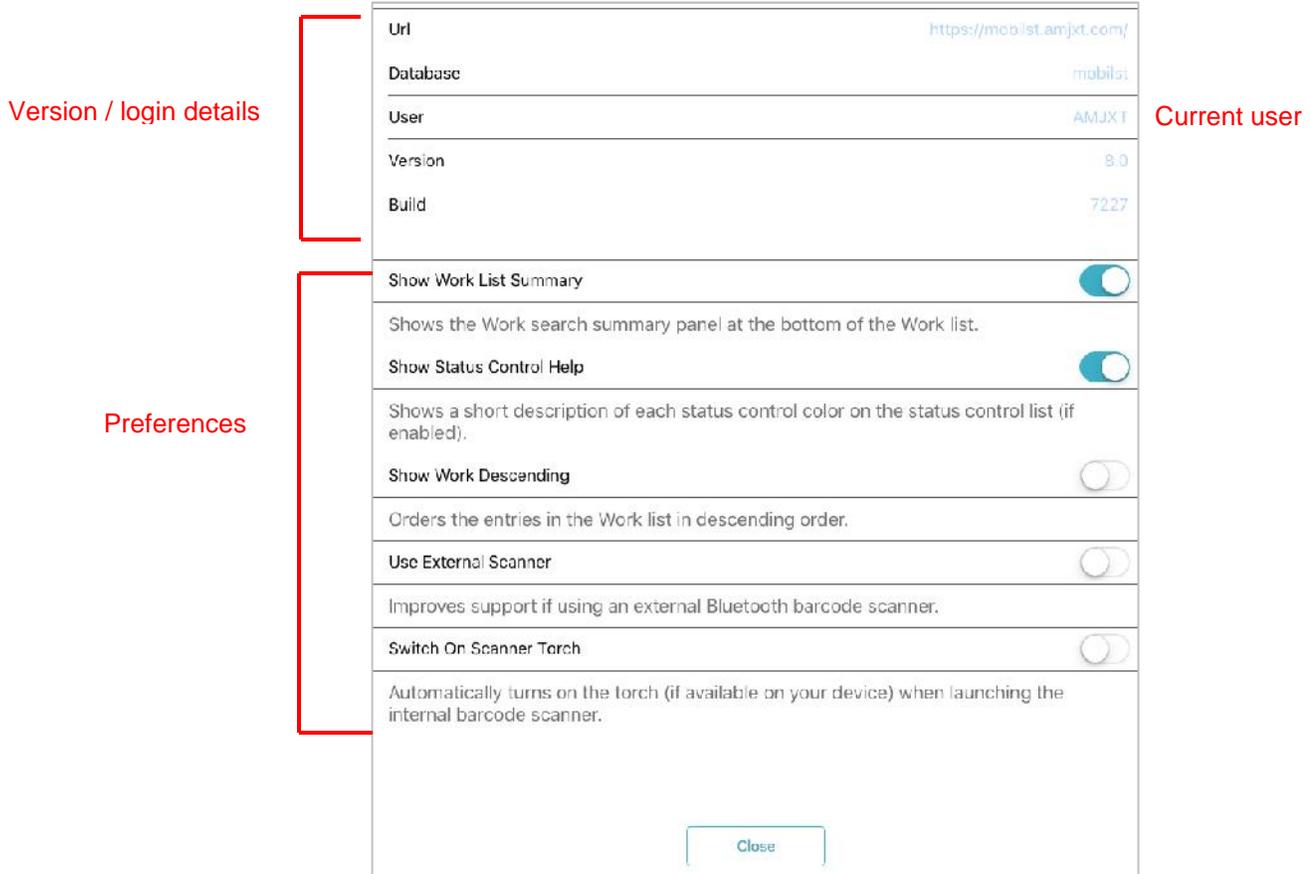
Click on any items to view them in full →

Queue		
Edit Work Reading	422758	>
Edit Work Reading	422759	>
Edit Work Reading	422761	>
Edit Work Reading	422760	>
Edit Work	16-0035950	>
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; display: inline-block;">Close</div>		

Swipe to the left on any item to bring up the **Delete** option. Pressing this will remove the item from the Queue. Any removed items will not be updated in the database once connectivity is restored.

Settings

Pressing the **Settings** link at the bottom of every screen takes you to a page from which you can view application details as well as set preferences for the current login.



Url	https://mob-ist.amjxt.com/
Database	mob-ist
User	AMJXT
Version	8.0
Build	7227
Show Work List Summary	<input checked="" type="checkbox"/>
Shows the Work search summary panel at the bottom of the Work list.	
Show Status Control Help	<input checked="" type="checkbox"/>
Shows a short description of each status control color on the status control list (if enabled).	
Show Work Descending	<input type="checkbox"/>
Orders the entries in the Work list in descending order.	
Use External Scanner	<input type="checkbox"/>
Improves support if using an external Bluetooth barcode scanner.	
Switch On Scanner Torch	<input type="checkbox"/>
Automatically turns on the torch (if available on your device) when launching the internal barcode scanner.	
Close	

Preferences

- *Show Work List Summary* – This displays the current search as well as the total count of records at the bottom of each Work List
- *Show Status Control Help* – Shows a brief description of each Status Control category
- *Show Work Descending* – Displays results in decending order by *Work Number* (instead of ascending)
- *Use External Scanner* – When barcode scanning is initiated, this will indicate whether the application should invoke the device’s internal camera or an external barcode scanner connected to the device via USB
- *Switch On Scanner Torch* – Automatically turns on your device’s torch (if available) when the scanner is launched

Entered Today 1 to 5 of 141



58 / 141 Completion Overdue	55 / 141 Not Yet Started	1 / 141 In Progress	★ All
24 / 141 Deferred in Future	0 / 141 Not Scheduled	1 / 141 Ready To Close	