

PUBLIC
SAP Service and Asset Manager
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SAP Service and Asset Manager User Guide - Maintenance Persona

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Document History

Before you begin reading this guide, be sure that you have the latest version. Find the latest version at https://help.sap.com/docs/SAP_SERVICE_ASSET_MANAGER.

The following table provides an overview of the most important document changes.

Document Version	Date	Description of Changes
1.0	JUN 2025	Original release of the *SAP Service Asset Manager User Guide - Maintenance Technician Persona*, version 2505.

1 About this Guide

The SAP Service and Asset Manager User Guide is provided for end users of the SAP Service and Asset Manager application.

The contents of this guide reflect the behavior and functionality of the SAP Service and Asset Manager application as provided by SAP through the software installers for the application. SAP Service and Asset Manager is developed and deployed on the Mobile Development Kit.

One of the benefits of the Mobile Development Kit platform is the ability to configure the behavior of the SAP Service and Asset Manager application. Therefore, it is likely that differences will exist between the information documented in the *User Guide* and the final behavior of the application for your implementation. In some implementations, the differences between the guide and the actual configuration of the application will be significant.

2 Common Functions for SAP Service and Asset Manager

2.1 Logging in to SAP Service and Asset Manager

To perform any work on the SAP Service and Asset Manager application, log in with your passcode.

Tap on the SAP Service and Asset Manager icon on your device to start the application.

> ⓘ Note
>
> If this is your first time logging on to the application, see the Initial Log In to the SAP Service and Asset Manager Application procedure for more details.

2.1.1 Multi-User Overview

Network Connection Available

Unsynced data from the previous user is uploaded into SAP, before switching users. If the first user's data can't be uploaded or uploaded with errors, user login fails with relevant feedback, including the previous user's username. If the second user logs in successfully, the user-relevant transactional and master data is downloaded. The user can sync pending requests before logging out. When you log out, you have the following options:

- **Continue without Syncing:** The app attempts to upload the pending transactions of the previous user when the next user tries to log in. If it fails, the next user is presented with a message that the previous user - with usernmae had pending transaction errors and must fix them before login.
- **Continue:** The app uploads the pending transaction and logs out, if any errors, sync error is displayed and then lets the user log out.
- **Cancel:** allows you to quit the logout process.

You can reset your data, regardless of whether other users use the app. However, if you log in again using the same device, you need to log in as a new user. *Log Off* and *Reset* are separate actions.

Network Connection Not Available

When network connection isn't available, the previous user's unsynced data remains on the client, and the next user login fails with appropriate feedback. The following user must wait until the previous user's data is synced succesfully.

2.1.1.1 Adding a New User or Logging in as an Existing User on a Multi-User Supported Device

When multi-user support is enabled, a device can be shared by a pool of users.

Context

When you log into a device with multi-user support enabled, you'll choose your user at the log in screen, or create a new user.

> **Note**
>
> In the case of multi-user access, log in to the application with an ArcGIS account with credentials that are specific to the user authentication.

Perform the following steps to log into a device with multi-user support:

Procedure

1. If you're a new user, do the following:
   a. Add user if you haven't used SAP Service and Asset Manager before.
   b. Log in to SAP Service and Asset Manager and download the relevant data.

      The new user onboarding flow is available at *EULA* > *Welcome* > *Login* > *Passcode* > *Initial screen*.
2. If you're an existing user, do the following:
   a. Select the user you want to log in as from the list of added users.
   b. Log in to SAP Service and Asset Manager on a shared device that you've used before, using your passcode saved during onboarding.
3. Open *Chrome* > *Settings*
4. In the *Experiments* tab, search for *Incognito mode*
5. Enable *Allow third party to open Custom Tabs Incognito mode*
6. Relaunch *Chrome*
7. Navigate to your *Authenticator* app

8. Sign in to *SAP Global ArcGIS Online Site*
9. Log in to SAP Service and Asset Manager and continue using the SAP Service and Asset Manager app where you left off.

2.2 Using the Side Navigation Bar

Access the side navigation panel by tapping the icon at the top left of the screen. The navigation panel that appears is also known as a **hamburger menu**.

Use the hamburger menu to access the following in SAP Service and Asset Manager:

- *Map*
- *Work Orders*
- *Notifications*
- *Equipment*
- *Functional Locations*
- *Reminders*
- *Timesheets / Confirmations*
- *Checklists*
- *Profile Settings*
- *Errors*

> ⓘ Note
>
> - The side navigation bar icon is available on all the screens within the application.
> - Additional detail screen options may display if your site is using specific solutions or features (for example, Meter Management).
> - Tapping on a selection takes you to the main list screen for that object.
> - Tap anywhere outside of an object selection of the hamburger menu to slide it out of view.

2.3 Using the Contextual Menu

You can swipe left or right on certain objects to display a contextual menu. A contextual menu shows only the available actions you can take on the object. For example, if a work order is started, you can swipe right to show the *Add Confirmation* action. If a work order is completed and you swipe right, the *Add Confirmation* action is not available.

The contextual menu is an addition to the normal navigation menu found on the top right of your application. You can use either the contextual menu or the normal navigation menu to acess actions.

The following objects use contextual menus:

- Work order

- Operation
- Suboperation
- Notification
- Equipment
- Functional location
- Timesheet
- Confirmations
- Documents
- Measurement documents
- Reminders
- Errors

2.4 SAP Service and Asset Manager Overview Screen

After you log into SAP Service and Asset Manager, the application takes you to your personalized Overview screen.

If extra components are installed (Customer Service, Meter Management, Crew Management and Field Operations Worker), and depending on which objects are included in the service or work orders assigned to you, you may not see all of the sections described in this topic on your Overview screen.

At the top left of the screen is a small circle with your selected profile picture. Tap the circle to access your profile settings. See Profile Settings Overview [page 15] and the subtopics for more information.

Next, you see a map of your immediate surroundings. You can view your assigned work orders and notifications on the map. Tap on an icon to view more details about the work order or notification. See Maps Overview and Settings Options [page 116] and associated topics for more information.

Below the map is your *High Priority Work Orders*. Here, you find a list of all of your high and very high priority work orders. Unless your administrator has configured the SAP Service and Asset Manager application differently out of the box, you see the priority, due date, and order ID of the work order.

> ⓘ Note
>
> If the Customer Service component is used, the section is labeled *High Priority Orders*.

Following the *Time Sheets* section are multiple subsections. Tapping on a subsection takes you to the detail screen for the object. For example, tap on *Notifications* to access the Notifications Detail screen. If your assignments do not contain any of the objects, the subsection does not appear on your device. That is, until a work order contains a note, you do not see the *Notes* subsection on your Overview screen.

- **Work Orders:** See the *Working with Work Orders* chapter
- **Operations:** See the How to Work with an Operation or Suboperation Maintenance Activity [page 58] topic and subtopics
- **Notifications:** See the *Working with Notifications* chapter
- **Equipment:** See the *Working with Equipment* chapter
- **Reminders:** See the Adding and Editing Reminders [page 13] topic

- **Functional Locations:** See the Functional Location Overview [page 133] topic

2.4.1 Adding and Editing Reminders

Use the *Reminders* section on the SAP Service and Asset Manager Overview screen much like you would a To Do list or a PostIt note to yourself.

Access your main Reminders list from the SAP Service and Asset Manager Overview screen. Here, you can add additional reminders or edit the current reminders. You can also add or edit reminders from any job or notification detail screen.

Adding a Reminder

You can add a reminder from the main SAP Service and Asset Manager Overview screen, an individual work order details screen, or an individual notification details screen:

- From the main SAP Service and Asset Manager Overview screen, tap in the *Reminders* section to access the main Reminders screen. Then tap the + icon to add a new reminder.
- From the main Work Order detail screen, tap on a single work order to access the details screen for the work order. Then tap the + icon and select *Add Reminder*.
- From the main Notifications detail screen, tap on a single notification to access the details screen for the notification. Then tap the + icon and select *Add Reminder*.

No matter which path you take to add your reminders, they all are saved to one main list; the Reminders list, which is located on the main SAP Service and Asset Manager Overview screen. Unlike notes, your reminders are not saved to a particular work order or notification, though you may start the process of adding your reminder from a work order or notification.

Once you reach the Add Reminder screen, type a *Name* for your reminder in the `<Name>` field. If you are working within a notification or a work order, you may consider adding the work order or notification number in the name. Then, add your description in the `<Description>` field and tap *Save*.

> **Note**
>
> The `<Description>` field has a limit of 40 characters.

Your reminder is saved to the Reminders list, viewable on the main SAP Service and Asset Manager Overview screen.

Editing a Reminder

You can edit any reminder on your Reminder list. To edit a reminder, navigate to the main SAP Service and Asset Manager Overview screen and tap on the Reminder list to access the full list of reminders. Find the reminder you wish to edit and tap on it. Tap *Edit*. Make your changes, then tap *Save* to save your changes.

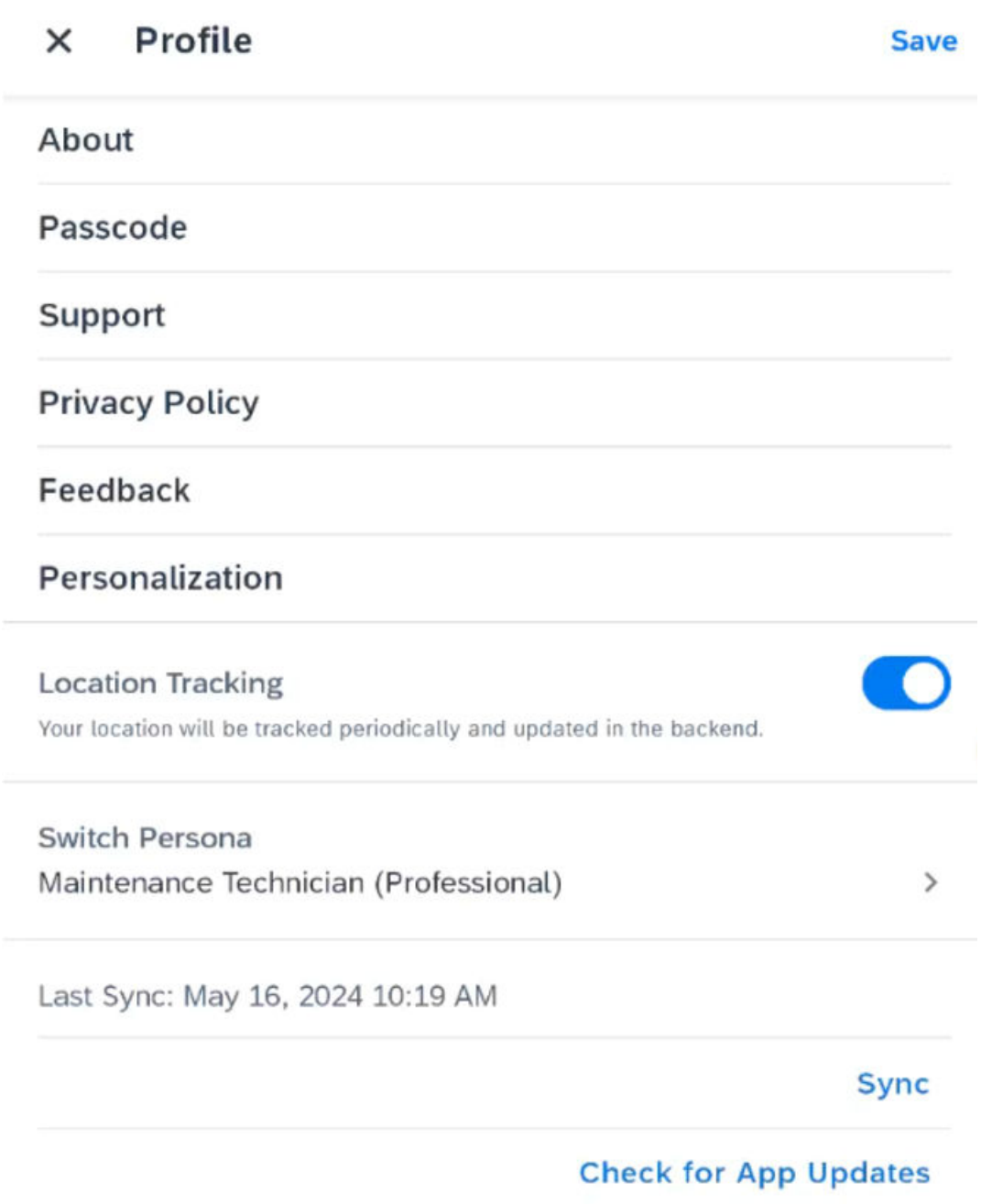
Discarding a Reminder

To discard a reminder, tap the desired reminder you wish to discard, then tap *Edit* to enter edit mode. Tap *Discard* at the bottom of the screen to discard the reminder. Tap *OK* in the confirmation window to confirm the discard. The reminder is no longer in your list of reminders.

You can also swipe a selected reminder row to access the contextual menu with the discard option.

2.4.2 Profile Settings Overview

Use the *Profile Settings* option to access the following in your application:



- *Passcode*: See Changing Your Passcode [page 16].
- *Support*: See Get Support for SAP Service and Asset Manager [page 17].
- *Privacy Policy*: Read the SAP Privacy Statement to understand what personal data is processed by SAP and what rights it has in this context.
- *Personalization*: Refer to Personalization Settings.

- *Location Tracking*: You need to enable this feature if you want to share your location data. If this setting is turned on, the Administrator will be able to see your location and assign you tasks accordingly.

  > **Note**
  >
  > - For more information about configuring this feature, see Location Tracking Configuration.
  > - For more information about using maps, see Maps Overview and Settings Options [page 116].

- *Switch Persona*: See Switching Between Personas [page 25].
- *Sync*: See Syncing to the SAP Back End [page 17].
- *Check for App Updates*: Tap to check if there is a new version of the app or if you must update the app.
- *Reset*: See Resetting the SAP Service and Asset Manager Application [page 19] topic.

2.4.2.1 Changing Your Passcode

If you feel your application was compromised, you can change your passcode.

Context

At times, you may want to change the passcode you use to access the SAP Service and Asset Manager application. Or, your company may have a policy requiring you to change your passcode at regular intervals.

Procedure

1. On the top right of the *Overview* screen, tap *Profile Settings*.

   The *Profile* screen displays.
2. Enter your current passcode in the *Change Passcode* field and tap either *Next* or *Done* to continue.
3. Choose a new passcode with a minimum of four digits and type it into the passcode field. Tap *Next* to continue.
4. Confirm your passcode by typing the same four digits you just typed in the previous step into the passcode field. Tap *Done* to complete changing your passcode.

Results

A popup message displays confirming that the passcode change is successful.

2.4.2.2 Get Support for SAP Service and Asset Manager

If you need additional help with the application, user assistance for SAP Service and Asset Manager is a quick phone call, e-mail, or a FaceTime chat away.

At times, you may sync to the back end and SAP returns an error message to your device that is difficult to troubleshoot. Or, you might need some additional information that this *User Guide* does not cover, perhaps due to customizations on the application for the specific needs of your work orders. In these cases, SAP has provided you with a way to easily access customer support, in the way that you find most helpful. To access customer support:

1. On the top right of the *Overview* screen, tap *Profile Settings*.
   The *Profile* screen displays.
2. On the *Profile* screen, tap *Support*. The *Support* screen displays.

Contact Us has three ways to get support:

- Tap  to call customer support.
- Tap  to start a FaceTime call with customer support
- Tap  to e-mail to customer support

When you tap an icon, the call, FaceTime call, or e-mail begins automatically, so be alert to the fact in case you are not in a good area or ready to call.

2.4.2.3 Syncing to the SAP Back End

Sync to the back end after you finish your work day, or after you have created local objects on your client and want to transmit them.

Context

You can sync anytime you're online and a network connection is available. A sync is needed when you see the following symbol next to an object: 

When Sync Is Disabled

If a sync is already in progress, if you tap the *Sync* icon, a banner at the top of the screen appears stating that *Sync is already in progress*. A second sync doesn't occur and the original sync continues. Once the original sync finishes, you can start a new sync if desired.

If a sync is in progress, and you select to download a document, a message appears stating *Sync is in progress, will download after sync is complete*. After the sync finishes, your selected document download automatically starts.

> **Note**
>
> The 2305 version of SAP Service and Asset Manager for Windows does not support automatic synchronization.

Procedure

Tap the *Sync* icon from the top right corner of the *Overview* screen.

While synchronizing from the *Profile Settings* screen, you will see a time and date stamp below the synchronization field. This stamp indicates when you last performed the synchronisation.

The application synchronizes with the back end. If any errors occur during the synchronization process, you can view them by tapping on the *Sync Errors* field.

Next Steps

If errors occur during the sync, continue to the topic Error Handling [page 20]. If you can't resolve the errors yourself, see the topic Get Support for SAP Service and Asset Manager [page 17].

2.4.2.3.1 Automatic Syncing

Back end administrators can configure the app to auto-sync. Auto-syncs occur automatically, with no input needed from the app user.

> **Note**
>
> - If you have questions, talk to your site administrator.
> - For more information about configuring the Auto-sync feature, see Auto-Sync Configuration.

Auto-syncs can happen in the following ways, depending on your site configuration:

- The app auto-syncs when network connectivity changes from offline to online.
- The app auto-syncs when the status of work orders, operations, sub-operations, or notifications is changed.
- The app auto-syncs periodically when it is running in the foreground of the mobile device.
- The app auto-syncs when the app is launched or is moved from the background to the foreground on a mobile device.
- The app auto-syncs when a database save occurs in the app.

2.4.2.4 Resetting the SAP Service and Asset Manager Application

The SAP Service and Asset Manager application stores application data in its local databases on the client device. In the unlikely event your local database becomes corrupted, you can completely reset your application.

Context

> **Note**
>
> Resetting the device is the only way to completely log out of the SAP Service and Asset Manager application. Ensure that you want to completely log out of the application before performing a reset, as all nontransmitted data is lost after the reset occurs.

1. On the top right of the *Overview* screen, tap *Profile Settings*.
   The *Profile* screen displays.
2. On the *Profile* screen, tap the *Reset* field.
   A *Confirm Reset* dialog window displays.
3. Tap *OK* to confirm the application reset, or *Cancel* to cancel out of the reset.
   If you tapped *OK*, the application resets and you are returned to the original SAP Service and Asset Manager screen.
   See Initial Log In to the SAP Service and Asset Manager Application for further instructions on how to continue with an initial logon.

2.4.2.5 Working with Activity Logs

Context

At times, if you are working with customer support, they may want you to enable activity logging and to set the log levels while you are using and transmitting with SAP Service and Asset Manager. That way, they can look at the logs to help diagnose the underlying issues.

You can enable logging at multiple levels, or not enable it at all. If you set it at too high a level, it uses numerous resources, which does not help the functionality of the SAP Service and Asset Manager. Therefore, when you are finished troubleshooting any issues on your device, best practices suggest returning logging levels to what they were at the time of the original SAP Service and Asset Manager installation on your device.

To change or set a log level for customer support:

Procedure

1. Tap the hamburger menu icon on the top left of the *Overview* screen to open the side navigation menu. Tap *Profile Settings*.

   The *Profile Settings* screen displays.
2. Tap the `<Support>` field, then tap the `<Activity Log>` field.

   The *Activity Log* support screen displays.
3. Tap the *Enable Logging* radio button so that logging is enabled.
4. Tap the `<Log Level>` field.

   The *Log Level* screen displays.
5. Select and tap the log level that customer support requested you record on your client device. This can be an error, debug, warn, or info.

   A checkmark will appear next to the log level you selected and you will be returned to the *Activity Log* screen.

Next Steps

After working on your client device for some time, or performing tasks that customer support requests, depending on your issue, tap the *Send Activity Log* link to send your activity logs to the back end for further investigation.

2.4.2.6 Error Handling

Sometimes, after a transmit, you're alerted by the application that errors in object transactions are preventing the sync of those objects. You can dismiss the errors or attempt to fix the objects before transmitting again.

Error Alerts

At times, when working with objects in SAP Service and Asset Manager, you can introduce errors to an object or a transaction. If errors occur during the sync, an alert banner appears at the top of the app screen. To fix or discard these errors, open the hamburger menu and select *Errors*. To view details of an individual error, tap the error. A screen displays showing you the full error description.

Fixing Errors

Often, when you read an error message, the issue with the erroneous object is apparent. You can fix these errors by editing the object. Tap *Fix* to fix the error.

The mobile device navigates to the object to which the error message is referring. Here, you can edit the object so that it doesn't return an error during transmit. Perform a sync. If the error message doesn't appear on the *Errors* screen, the error is resolved. If other errors exist, you can either fix or discard them.

If an error can't be fixed from the device, a pop-up message appears to let you know the error cannot be fixed through editing. Tap *OK* to discard the error and return the object to its original state.

Discarding Individual Errors

Deleting a selected error deletes all changes made to that object that includes the error and returns the object state to the state it was in at the last transmit. To discard an individual error, tap on *Errors*. Tap on an individual error to view the error details. Tap *Discard* to discard that individual error.

You can also swipe a selected error to access the contextual menu with the discard option.

If you don't discard all errors on the device, an error alert banner will still appear during your next sync. If you tap on an error message where you've already discarded the transaction, a pop-up displays to alert you the transaction has been disarded and is no longer available.

Discarding All Errors

Once you tap on *Errors*, tap on *Discard All* to discard all errors on the client.

Discarding all errors deletes all changes to the edited objects with errors. An example of a scenario where you would delete all errors on the client is meter installation. To discard the install, delete all errors. Deleting all errors deletes the local entities created as well as the update transaction, and returns the objects to the state they were in at the last transmit. You can then attempt to install the meter again.

When you delete all errors, an error banner will not display on the app during the next sync. If you tap on an error message where you've already discarded the transaction, a pop-up displays to alert you the transaction has been disarded and is no longer available.

2.4.2.7 Registering Digital Signature

Prerequisites

An authenticator application, such as Microsoft Authenticator or Google Authenticator, is installed on the client device.

Context

Procedure

1. Choose one of the following paths:

During Initial App Installation	After App Installation
Install the application, following the procedure in Initial Log In to the SAP Service and Asset Manager Application.	Tap the icon at the top left of your screen. A slide-out navigation bar appears. Access your profile by tapping *Profile Settings*.
A *Register Device* popup appears after the initial sync. Tap *OK* to register. Continue to the next step in this procedure.	Select *Register for digital signature*. Continue to the next step in this procedure.

2. Create a passphrase using the instructions provided on the pop-up *Create Passphrase* screen. Tap *Next*.

   The *Get Passcode* screen appears.
3. Tap *Get Passcode*.

   Your installed authenticator app opens. Copy the generated token and navigate back to the SAP Service and Asset Manager client.

   > ⓘ Note
   >
   > The generated token is good for 30 seconds. Tokens are refreshed every 30 seconds.
4. Paste the copied token into the `<Passcode>` field. Click *Register*.

Results

A message appears telling you the device is successfully registered.

2.4.2.8 Unregistering Digital Signature

Prerequisites

To unregister digital signature, digital signature must be enabled on the back end. Digital signature must be registered on your device.

An authenticator application, such as Microsoft Authenticator or Google Authenticator, is installed on the client device.

Procedure

1. Tap the icon at the top left of the screen.

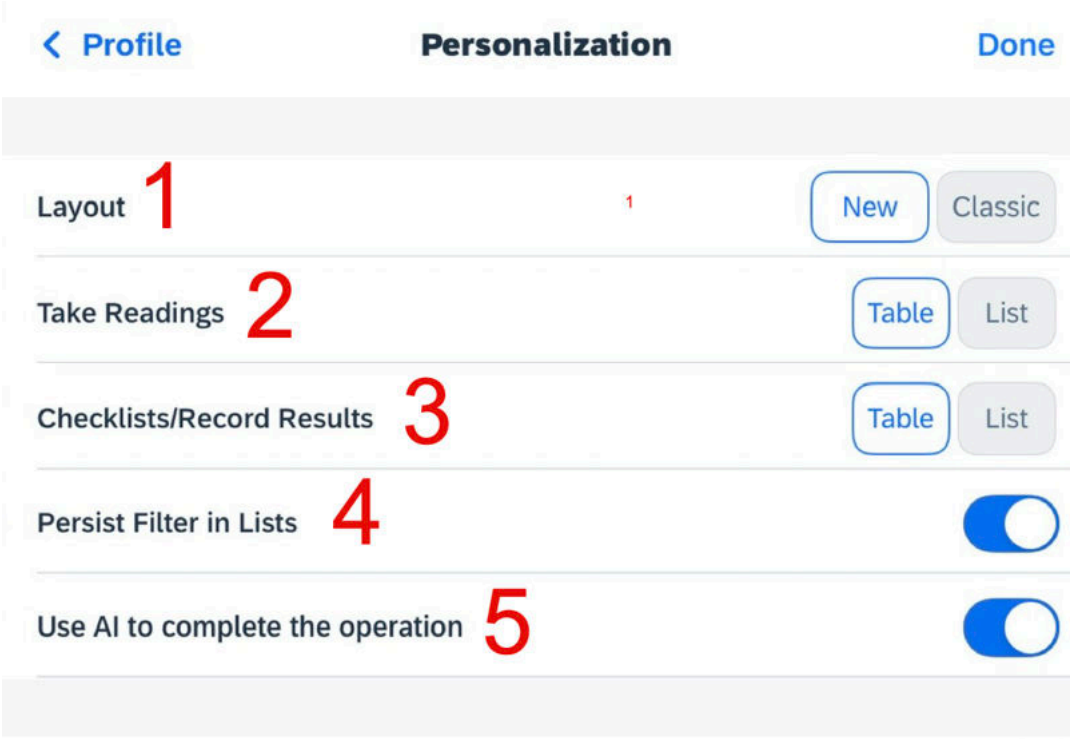
   A slide-out navigation bar appears.
2. Tap *Profile Settings*.

   The *Profile* window appears.
3. Tap *Unregister device for Digital Signature*.
4. Open your authenticator app and delete the generated token.

   If you want to register for digital signature at a later date, the authenticator app will automatically generate a new token.

2.4.2.9 Personalization Settings

In the *Profile Settings* > *Personalization* menu you can change the following settings:



1. *Layout*: Switch between the *New* and *Classic* views.

   > ⓘ Note
   >
   > The new version displays the KPI section header on the Home Screen and supports more quick action functionalities and transparent layout (e.g. cards for relevant objects) to provide faster navigation.

2. *Take Readings*: When taking Measurement Readings, you can switch between *Table* and *List* views to record the results.

   > ⓘ Note
   >
   > For more information, see:
   > - Working with Editable Data Tables [page 37]
   > - Measuring Points and Readings Overview [page 97]

3. *Checklist / Record Results*: When recording results on a Checklist, you can switch between *Table* and *List* views to record the results.

   > ⓘ Note
   >
   > For more information, see:
   > - Working with Editable Data Tables [page 37]
   > - Recording Results in Table View [page 74]
   > - Recording Results in List View [page 75]

4. *Persist Filter in Lists*: On any list screen, if you save a filter criteria for that page, those filter criteria will not change until you reset or change again, even if you navigate to another screen.
5. *Use AI to complete the operation*: You can complete your job with AI-assisted speech recognition, instead of manually entering data required for the completion. For more information, see Using AI to Complete Your Job [page 79].

2.4.2.10 Switching Between Personas

If you are assigned to multiple personas, you can switch between them, and you will be able to access functions and work tasks applicable to that specific persona.

Context

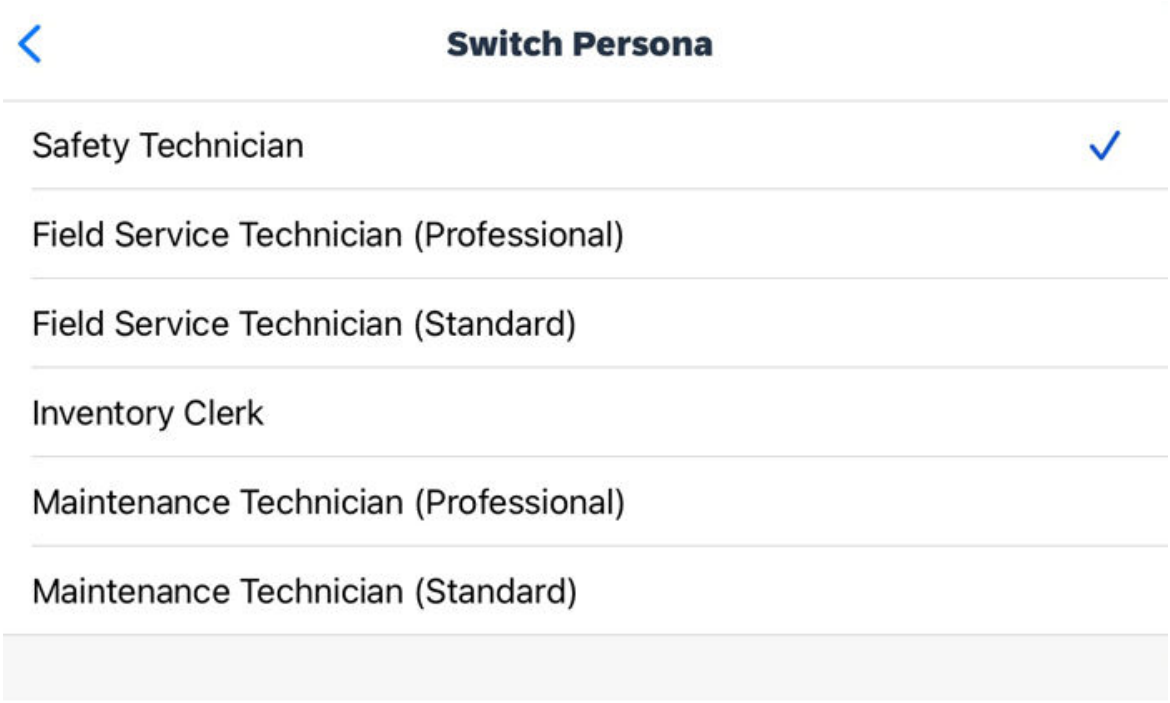
> ⓘ Note
>
> In the case of multi-user access, log in to the application with an ArcGIS account with credentials that are specific to the user authentication. This generates an access token that authorizes the application to access services and content on your behalf. The resources and functionality available depend on the user type, roles, and privileges of their ArcGIS account. For more information, refer to the Adding a New User or Logging in as an Existing User on a Multi-User Supported Device [page 10] topic.

> ⓘ Note
>
> **Example:** The Maintenance Technician persona views and works with work orders, while the Inventory Clerk persona views and works with goods and stock. If your job requires you to maintain equipment while also working with inventory used to maintain the equipment, you will use the Inventory Clerk persona to pull the correct inventory and log it in the system. Then you switch to the Maintenance Technician persona to complete the work order assigned to you about the equipment.

To switch personas, perform the following steps:

Procedure

1. Tap the  icon at the top left of the screen to access the *Side* menu. Tap *Profile Settings*.
2. Tap the *Switch Persona* option.



> **Note**
>
> If only one persona is enabled on the back end, or if your user is assigned to **only** one persona, the *Switch Persona* option will not be available.

3. Tap your desired persona.

Results

The app syncs to the back end, to get data for the selected persona as well as any objects assigned to you. When the sync completes, you will have access to the specific screens you need to work with your selected persona.

> **Note**
>
> - On your initial sync, the default persona assigned to you determines what screens and functions you see on the app. You only see the information that you need to complete your tasks.
>   - If you log out, the app retains your current persona setting.
>   - If you log back on, you will have the same persona selected.
>   - If you reset the app, your default persona will be displayed.
> - For more information about how to assign users to personas, see Configuration Guide - Configuring Personas.
> - For more information and overview of personas, see Application Product Overview - Persona Overviews.

2.5 Searching for Objects

Use

If you see a *Search* bar at the top of the screen, you can perform a search for any object in SAP Asset Manager. In this way, you can find an operation, a maintenance request, a technical object, or a maintenance order.

How to Search for Objects

The search function is available on an object detail screen if the search icon () appears, and you see the *Search* bar at the top of the screen. For example, when you tap *Operations* from the *Overview* screen to access the *Operations* detail screen, the *Search* bar appears at the top of the *Operations* screen.

When you perform a search, you are only searching the objects listed on the object detail screen you have displayed, and therefore only objects currently on your mobile device. If you do not locate the object you are looking for through a search, contact your administrator, as the object may not be located on your mobile device.

Performing a search is different than using a filter on an object list. To learn how to use filters, see the Filtering Objects [page 27] topic.

2.6 Filtering Objects

Use a filter to view only objects you want to work with. Filters sort objects by various values that you select, depending on the type of object.

Many of the main objects you work with in SAP Service and Asset Manager, such as operations, maintenance requests, technical objects, maintenance orders, have the *Filter* option at the top right corner of the header bar. At times, object lists can get long, and scrolling or searching for objects in the lists becomes time consuming or even almost impossible. Use the *Filter* function to cut the list down to only the objects that meet the specifications you require at the moment.

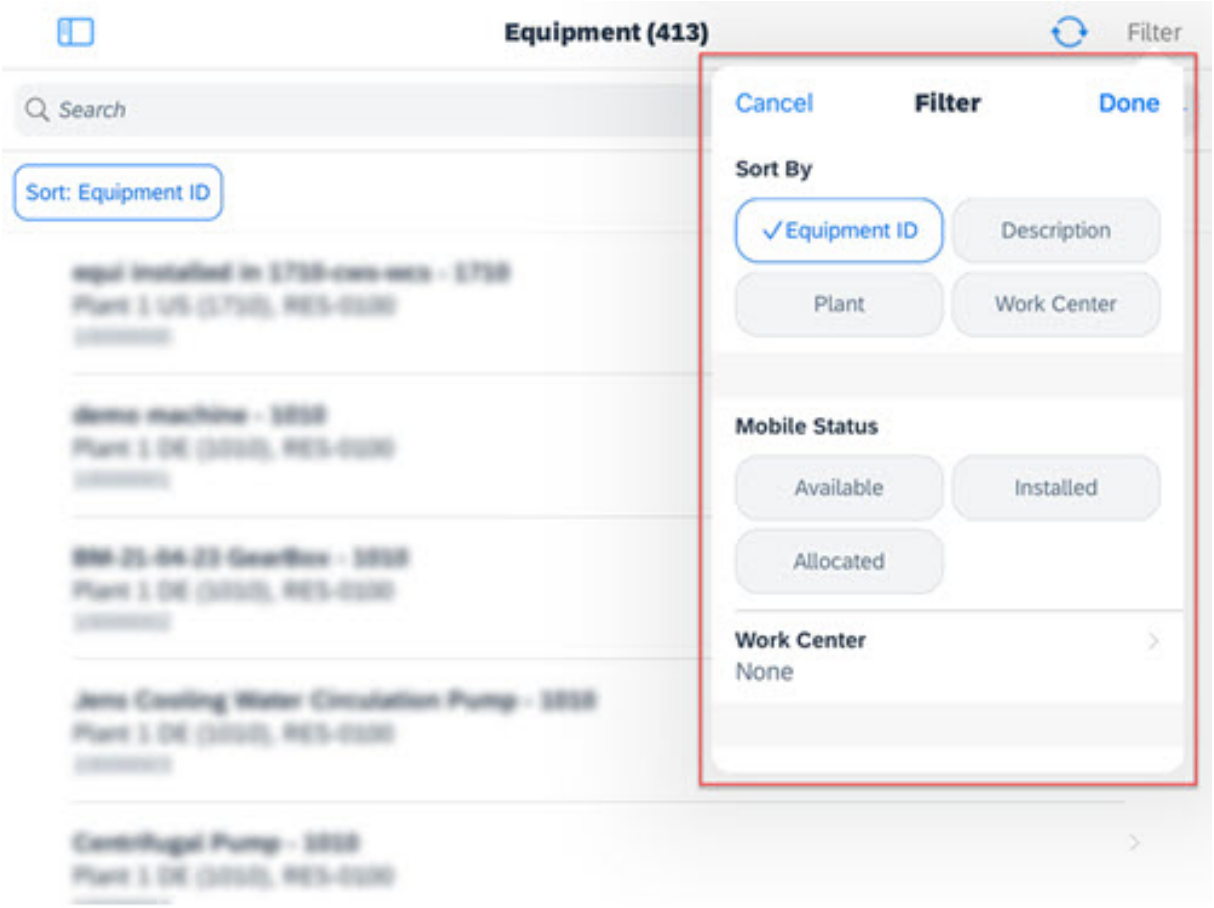
> ⓘ Note
>
> Setting up a filter is not the same as creating favorite work orders. To learn more about creating favorite work orders, see Creating and Filtering Favorite Work Orders [page 29].

Creating an Object Filter

To set an object filter, tap the *Filter* option in the header bar to access the filter choices for that object. The values available for the object determine the sections for the object and the variables you can choose to filter within the sections.

Choose and tap a variable to filter at least one section. You do not need to select a variable in every section. You can select only one variable per section. When you are satisfied with your filter choices, tap *Done*.

Your object list is filtered according to your filter selections.



Removing an Object Filter

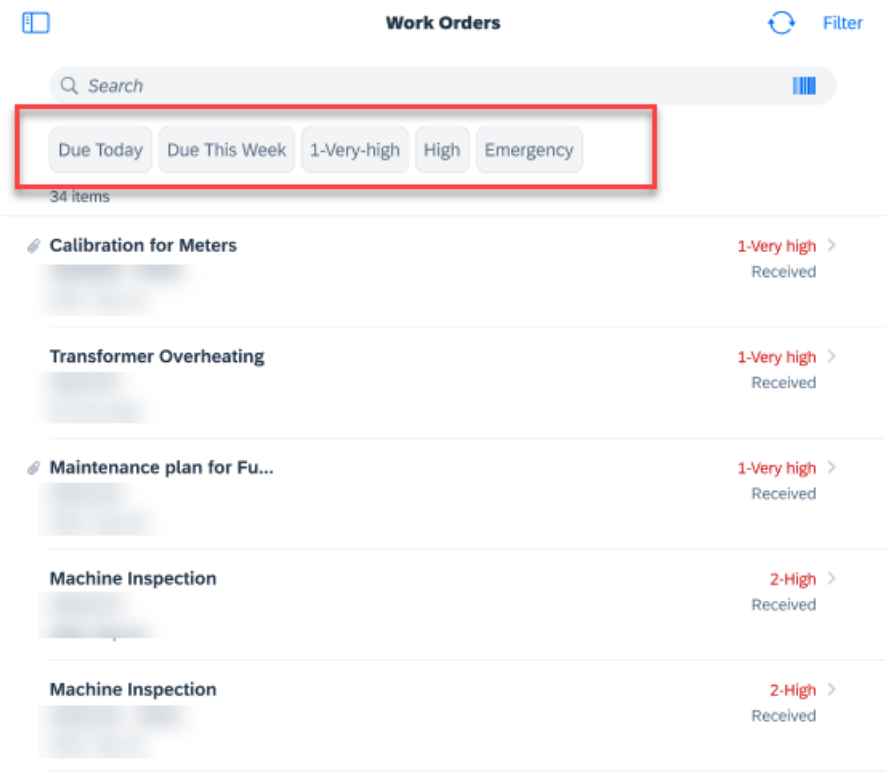
To remove an object filter, tap the *Filter* option in the header bar to access the filter choices for that object. Your filter options that you have selected for the object are highlighted in each section. Tap each option you want to remove so that it is not highlighted. Or, tap *Reset All* at the bottom of the *Filter* screen.

To completely remove a filter for an object, ensure that nothing is highlighted under the *Filter* option.

When you are finished, tap *Done*. Notice that the filter for the object is removed and your object list displays all objects again.

Using Quick Filters

On most of the list pages you can filter the list of objects by clicking one or more quick filters below the search bar. All pages have some default corresponding quick filters, however, you can also add custom ones by simply selecting additional filters as described above [page 28]. Unlike default ones, custom quick filters will only be displayed until you unselect them either from the bar or the filtering menu, or navigate to another list page.



2.6.1 Creating and Filtering Favorite Work Orders

Use a Favorites filter to create your custom list of high and very high priority work orders.

Context

Procedure

1. From the main *Overview* screen, tap the *Work Orders* tab.

   The *Work Orders* detail screen displays.

2. Choose a *High Priority* or *Very High Priority* work order you wish to make a favorite and tap on it. The work order can have any status.

   The individual *Work Order* detail screen displays.

3. Tap the *Edit* icon ( ) at the top right of the screen.

   The *Edit Work Order* screen displays.

4. If the work order is not marked as a favorite, tap the radio button next to the `<Favorite>` field to mark it as a favorite. If the work order is marked as a favorite and you want to remove it, tap the radio button to unmark it. Press *Done* when finished.

   A star icon ( ) appears to the left of the work order description, denoting that you have marked it as a favorite. You can now filter this work order into a Favorites list.

5. If you are not already at the *Work Orders* detail screen, navigate to that screen and tap *Filter*.

   The Filter window displays.

6. Tap the *Favorite* button in the *Filter By* section. You can optionally select other choices in the other sections if desired. To set the filter, tap *Done*.

Results

Your *Work Orders* detail screen is now filtered according to your selected favorite work orders. To see all of your work orders again, remove the filter.

2.7 Editing an Object

You can edit any object on the SAP Service and Asset Manager application, as long as you see an *Edit* action menu item.

Context

Follow the steps below to edit an object.

> ⓘ Note
>
> You can edit the following objects:

- *Operations*
- *Maintenance Requests*
- *Technical Objects*
- *Maintenance Orders*

Procedure

1. Tap on an object to access the detail screen of the object.

   The object detail screen displays.
2. Tap the *Edit* button at the top of the object screen.

   The Edit [Object] screen displays.
3. Tap in the fields you wish to edit and edit those fields. You may not be able to edit some fields; those fields do not respond when you tap on them. Objects that are not locally created may have very few editable fields. Objects that you have created yourself will have more editable fields. When you edit a note, you now have the ability to add longer texts.
4. When finished with your edits, tap *Done*.

   Your changes are saved to the object.

Results

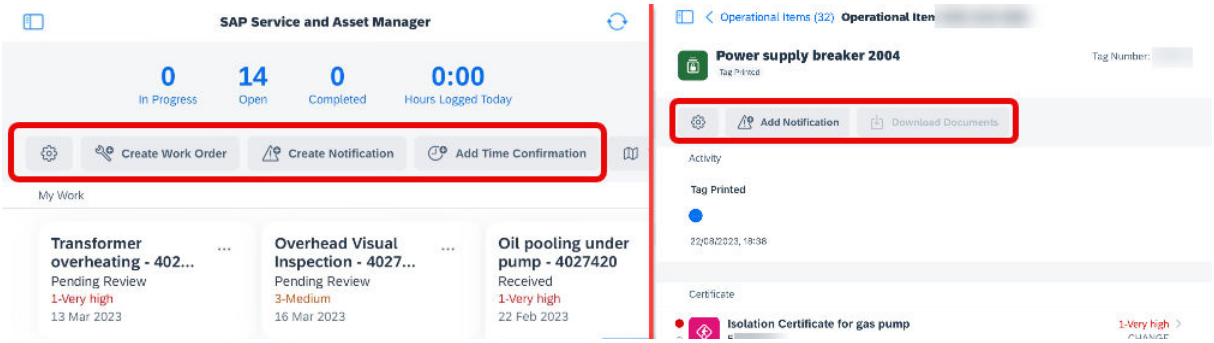
Remember to sync your device with the back end after making your edits so that your edits are transmitted to the back-end system. After you transmit a locally created object to the back end, many of its fields will no longer be editable if that object is reset back down to your client device.

If your sync results in an error or errors, see the Get Support for SAP Service and Asset Manager [page 17] topic, specifically the *Working with Activity Logs* section.

2.8 Using Quick Action Buttons

With quick action buttons you can access the most commonly used actions and menus with one tap. Quick action button functions are aligned according to the page or workflow you are in and they are displayed on the following pages:

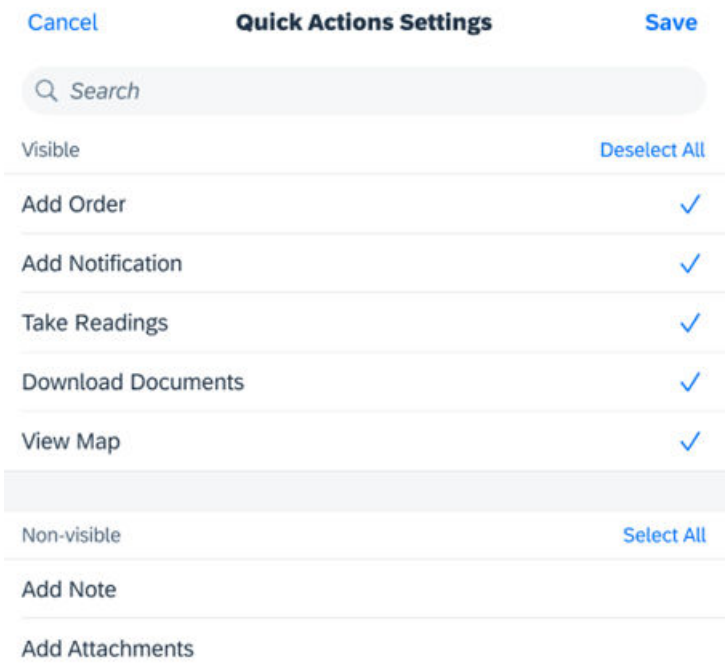
- **Home screen**
- **Details screens**



> **Note**
>
> If a Quick Action Button is greyed out, it either means there is no available content to view, or the action currently is not available for the user.

Quick Action Button Configuration

You can also configure the Quick Action Button bar to your preference on any details pages, by clicking the 'Gear' icon (see image above). Then in the *Quick Actions Settings* window, you can set them to visible or non-visible.



2.9 Working with Attachments

SAP Service and Asset Manager supports viewing of attachments, or documents, on the mobile device. You can also add an attachment to a local object.

Attachments include Microsoft Office documents, PDF files, and other commonly used business documents including videos, pictures, and audio files. When you select *Attachments*, the details screen displays the attachments that are available for download.

If objects have attachments associated with them, only limited information about them is fetched during the sync with the back end. The actual documents are only downloaded to your device at your request through a push process.

You'll see an *Attachments* section on the detail page for an object if attachments are available for the object. If there's a menu option to add an attachment, or if there is a + icon in the *Attachments* section, you can add a new attachment to the object.

Downloading an Attachment to an Object

On your first initial sync between SAP Service and Asset Manager on your client device and the back end, the only attachment, information downloaded to your device is the title of the attachment, the type of document it is, and the file size it will be after it is fully downloaded.

If the attachment has never been downloaded to your device, it displays a download icon (similar to the following: ) beside the attachment information. If the attachment was downloaded previously, the text beside the attachment information displays *Open*.

To download an attachment, tap on the attachment icon. A progress indicator displays, indicating that the document is being pushed to your device. When complete, the document displays on your mobile device.

To exit out of the document, tap *Documents*. To reopen any attachment, tap that document row. You do not need to redownload any previously downloaded attachment, even after a sync.

Attaching a Document to an Object

You can add an attachment with a related description directly from the menu *Add Attachment* option of the *Operations* object details screen.

And, you can add a document with a related description directly from the *Operations* (*Technical Objects*, *Maintenance Requests* or *Maintenance Orders*) object detail screen. In this case, tap the *Documents* section at the bottom of the screen.

Or, if you are in the *Edit* screen of an object and you see the + icon in the *Attachments* section, you can add a local document to that object.

Tap the + icon to start the process of adding an attachment to an object. A menu appears with the following options:

- *Photo Library*: Select a photo from the photo library on the mobile device.
- *Take Photo*: Take a photo using the mobile device camera.
- *Files*: Select a photo or other type of document from the library on the mobile device.

The photo or other type of document is successfully saved to the *Attachments* list as a local document. Be sure to sync to the back end to permanently save it to the attachments list.

Deleting a Document

You can delete a local document that you've attached to an object as long as you've not yet performed a sync to the back end.

Tap the desired document you wish to delete. Tap the delete sign button at the top of the screen to delete the document.

> **Note**
>
> If a document has been deleted, it is no longer attached to the object.

2.9.1 Editing Images and PDFs

The PDF and image editor allows you to add text, simple shapes, arrows and lines, or free drawing to documents. You can also resize documents, and edit annotations you've made that aren't synced to the back end.

At times, you may want to add supplemental information, such as arrows, shapes, or text, to highlight specific spots on a downloaded PDF or image. When you download and open a PDF or image, you'll see *Mark Up* at the top of the screen, noting that you can edit the document.

After you tap *Mark Up*, an editing toolbar appears at the bottom of the screen. See the following sections for information on how to use each edit feature.

Freestyle Drawing

Tap the paintbrush icon to freestyle draw on the image or document.

Tap the ● icon to change brush size and brush color.

Tap *Clear* to remove any edits you've made before saving, and then tap *Cancel* to exit out of the Edit screen. When you're satisfied with your edits, tap *Save*.

Adding or Editing Shapes

Tap the ⊞ add icon and then select one of the simple shapes that pops up to add that shape to the document or image. Tap the image where you want to add the simple shape.

Tap the ● icon to access a menu where you can change color and line weight as desired.

Tap *Clear* to remove any edits you've made before saving. When you're satisfied with your edits, tap *Save*.

Adding Text

Tap the T icon to add text, then tap the document where you want add the text. A text box appears. Use the device keyboard to add text.

Tap the ● icon to access a menu where you can change color and size as desired.

Tap *Clear* to remove any edits you've made before saving, and then tap *Cancel* to exit out of the Edit screen. When you're satisfied with your edits, tap *Save*.

Resizing or Cropping

To crop an image or document, tap the crop icon to open the *Crop Image* screen. Use the handlebars on each corner of the document to crop the PDF or image as desired.

Tap *Cancel* to exit out of the Crop Image screen and to keep the original image. Tap *Save* when satisfied with your crop.

To resize an image or document, tap the resize icon to open the *Resize Image* screen. Use the slider that appears to resize the image as a percentage of the original image. Tap *Cancel* to exit out of the Resize Image screen without making any changes. Tap *Save* and then *Overwrite* to save the new image size and overwrite the original image size.

2.10 Working with Notes

You can add or edit notes to many of the objects in the SAP Service and Asset Manager application.

> **Note**
>
> The objects you see depend on the persona you're assigned.

You can create or edit notes on the following objects:

- Maintenance Orders or Service Order details screen
- Maintenance Requests details screen
- Operations details screen
- A suboperation
- Follow-up work order
- Follow-up operations substep
- Measuring point reading

Read-only notes can be associated with equipment or functional locations. Tap on the *Notes* section to view any associated notes.

Adding a Note

To add a note to an object, tap the + or ... icon and select *Add to Note* from the menu. Or, you can add a note directly from the *Operations* (*Maintenance Requests* or *Maintenance Orders*) object detail screen. In this case, tap the *Notes* section at the bottom of the screen.

> **Note**
>
> If the *Add to Note* menu option isn't available, you can't add a note to the particular object.

The *Add Note* screen displays. Type your desired note into the `<Note>` field. When finished, tap *Done*. If a note already exists on the object, it's appended to the end of the already existing note. If you're unhappy with your note, tap *Edit* or *Discard* at the note screen. Your added text is changed or deleted.

2.11 Working with Classifications

Classifications identify and characterize similar objects. A building, computer, and centrifugal pump are types of classifications. A classification can also describe an event such as a broken water valve or an elevator door failure. Classifications are assigned to both equipment and functional locations in SAP Asset Manager.

If either an equipment or a functional location has classifications associated with it, a *Classifications* section displays on the *Technical Objects* detail screen of an equipment or a functional location. Tap the section to view the *Classifications* detail screen.

Tap any individual classification to view the detail screen for that classification. Here, you can see all the characteristic values of the object you selected. Tap an individual value to access the *Edit Characteristic* screen for the value. If needed, edit the value.

2.12 Working with Business Partners

Service orders, functional locations, and equipment can be linked to a business partner. Business partners are parties in which your company has a business interest. A business partner can be a customer, a prospect, a supplier, a competitor, or even an employee of your own company.

Most business partner information in the application is not editable. However, you can edit the business partner address and other location information to update it if necessary.

For an equipment or a functional location, tap on the main *Equipment* or *Functional Location* screen to access the *Business Partners* detail screen. Here, a list of the available business partners appears, with each business partner name and ID listed, as well as the partner type. For a service order, tap the *Business Partners* section on the main *Service Order* detail screen to access the *Business Partners* detail screen. Again, a list of the available business partners appears, with each business partner name and ID listed, as well as the partner type.

Tap a business partner to access the individual details for the partner. Individual details include contact details such as an address or a location for the partner, a phone number, or GPS coordinates, if available.

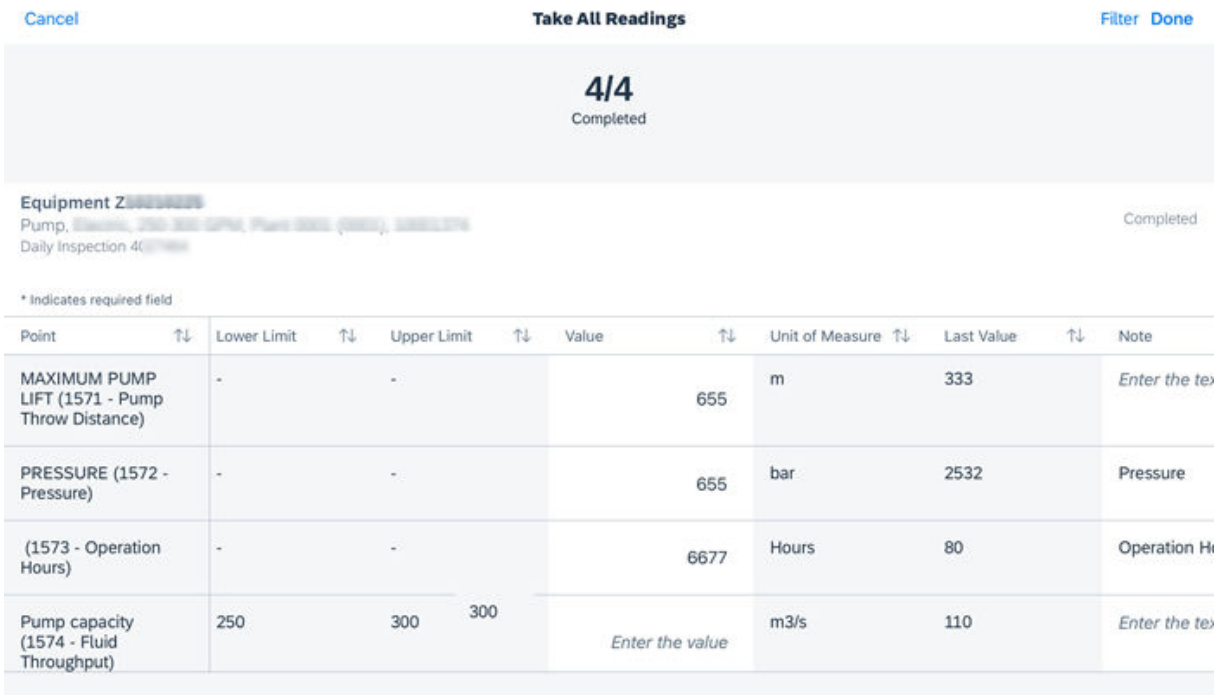
If you see the icons available, you can contact your business partner in the following ways: A phone icon (), a text icon (), and an e-mail icon (). Tap on the phone icon to call your business partner. Tap on the text icon to start a text message. Tap on the e-mail icon to begin an e-mail to your business partner. When you tap an icon, the call, text, or e-mail begins automatically, so be alert to the fact in case you are not in a good area or ready to call.

2.13 Working with Editable Data Tables

Use **Editable Data Tables** to enter multiple records quickly in a table format.

> **Note**
>
> Currently **Editable Data Table** is available only for:
>
> - Maintenance Technician persona: *Record Results* screen of *Checklists* (see Recording Results in Table View [page 74])
> - Maintenance Technician and Field Service Technician personas: *Taking measurement readings* (see Measuring Points and Readings Overview [page 97]).

By using *Table View*, the following additional functions are available compared to *List View*:



- Faster workflow when entering values.
- Valuation works automatically.
- Sort the table by columns.

> **Note**
>
> - For more information about how to enable the table view on the supported screens, see Personalization Settings [page 24].
> - For more information about the Editable Data Table extension and metadata customization, see Editable Data Table (EDT) in *SAP Service and Asset Manager Extensibility Guide*.

2.14 Using Online Search

Users can search online for *Functional Locations* and *Equipments*, allowing them to view, filter and optionally download more objects to their mobile device, in addition to the ones already downloaded. This way users have more visibility of ongoing tasks, not limited to the ones available only offline.

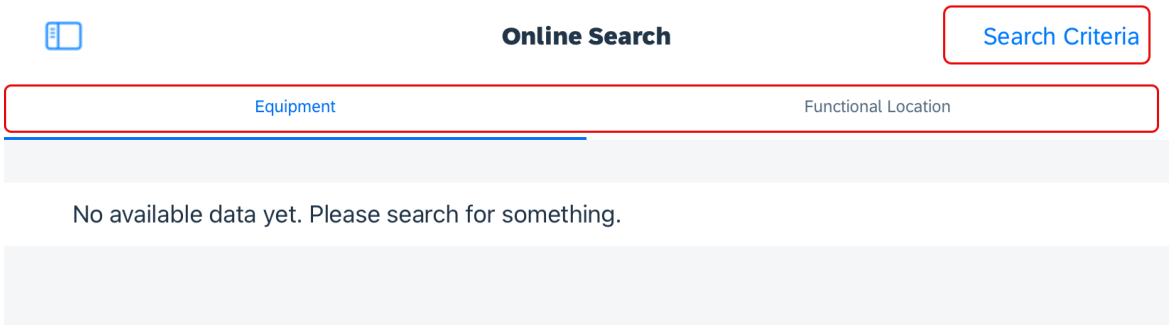
As of version 2410, SAP Service and Asset Manager supports online search for *Work Orders* and *Notifications*.

> **Note**
>
> - Users can only *download* and *assign* Work Orders and Notifications.
> - To use this feature from within the SAP Service and Asset Manager application, a working online connection is required.
> - For more information about how to configure this feature and supported personas, see Online Search Configuration and Configuring Online Search - Work Orders and Notifications.

Using the Online Search feature

You can access the online search feature either from the sidebar menu or from the list screens of objects supporting this feature. Perform the following steps to do an online search:

1. Select the object tab and tap *Search Criteria*.

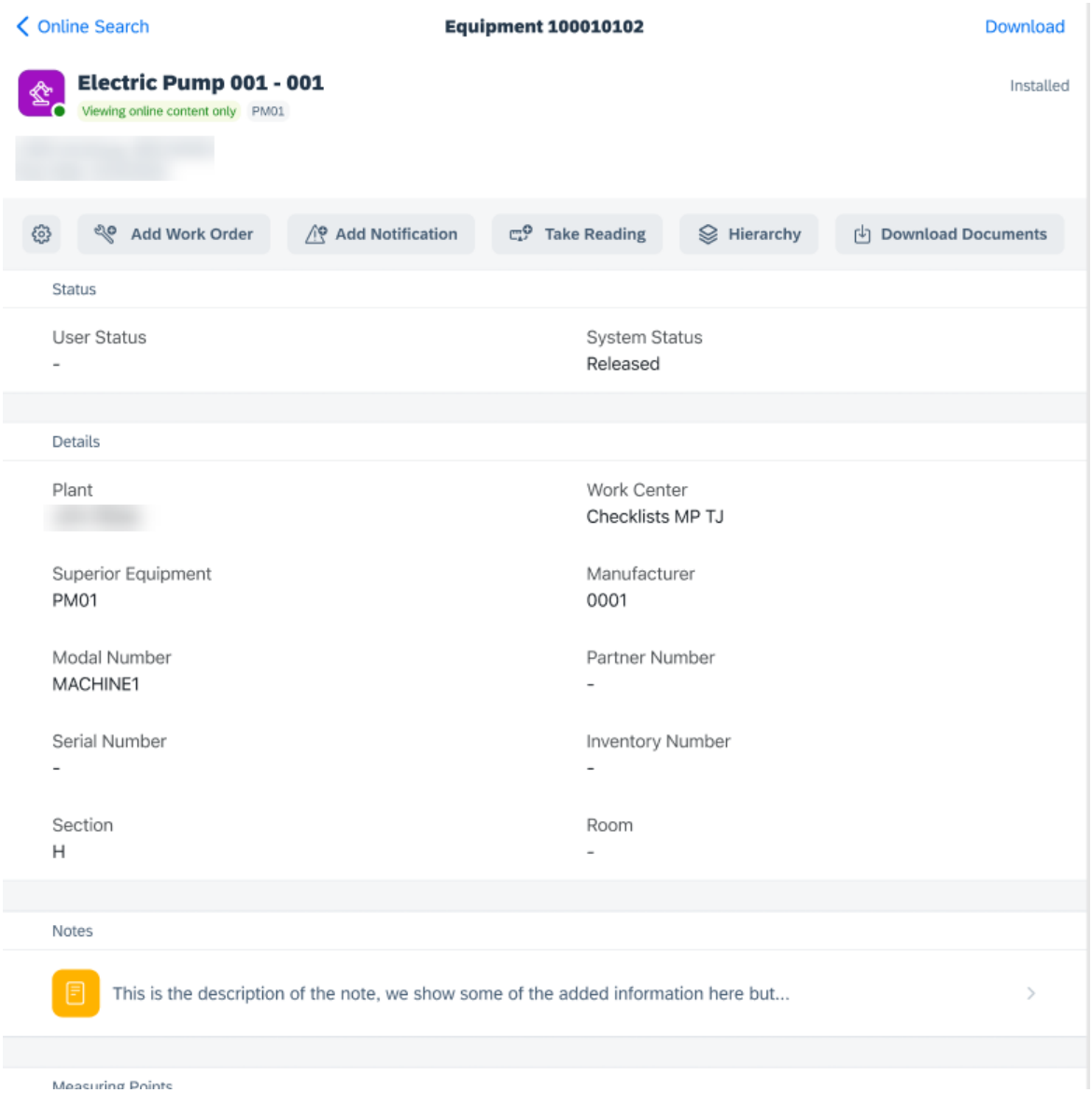


2. In the *Search Criteria* menu, filter your search by fields, for example *ID/Barcode* of the object or a free text that the object description contains, then tap *Search*.
   - Following are the supported **search criteria**:
     - *ID* (scan enabled field)
     - *Description*
     - *Category*
     - *Maintenance Plant*
     - *Location*
     - *Planner Group*
     - *Planning Plant*
     - *Plant Section*
     - *Room*

        - *Work Center*
        - *Manufacturer*
        - *Status* (*Deletion Indicator*, *Created*, *Deletion Flag*, *Object Deactivated*)
    - Following are the supported **sorting options**:
        - *ID*
        - *Description*
        - *Work Center*
        - *Plant*
        - *Status*
3. You will see a list of objects, including the ones that are already available offline on your device (with the status *Available Offline*), and also the online objects. Click *Download* for an online item.

    > ### Note
    >
    > If you click on an item that is already available offline, you will go to its regular details page.

4. By tapping any object in the list, you can also view the details screen of that object. From here, you also have the option to *Download* the object to your device.
    - On the details page, you **cannot edit or perform usual tasks on online objects**, compared to the ones available offline. Only the following actions are available:
        - *Download*
        - *Add Work Order*
        - *Add Notification*
    - Also, if you add a Work Order or Notification from an online object's details page, you will not be able to see the linked object on the work order or notification immediately, **only after a sync**.



2.15 Working with Dynamic Forms

SAP Service and Asset Manager supports SAP Dynamic Forms, an SAP Business Technology Platform application that allows you to design, deploy, and use basic and complex forms. Key functionalities include:

- Support to create and edit form instances associated with the following business objects:
  - Work Orders
  - Notifications
  - Equipments
  - Functional locations
  - S/4 service system:

    - Service Orders
    - Service Items
- Ability to create, edit and delete forms locally. While being offline, users can:
    - Open, complete and submit locally created forms.
    - Modify and save locally created and updated forms.
    - Delete an unsynced form.
- Support for syncing forms on SAP BTP.

> **Note**
>
> - For the complete list of SAP Dynamic Forms mobile features, refer to SAP Dynamic Forms Feature Scope Description.
> - For more information, see SAP Dynamic Forms product page.
> - To configure SAP Dynamic Forms for SAP Service and Asset Manager, see SAP Dynamic Forms Configuration for SAP Service and Asset Manager

Supported personas

This feature is applicable for the following personas:

Maintenance Technician (Standard)
Maintenance Technician (Pro)
Field Service Technician (Standard)
Field Service Technician (Pro)

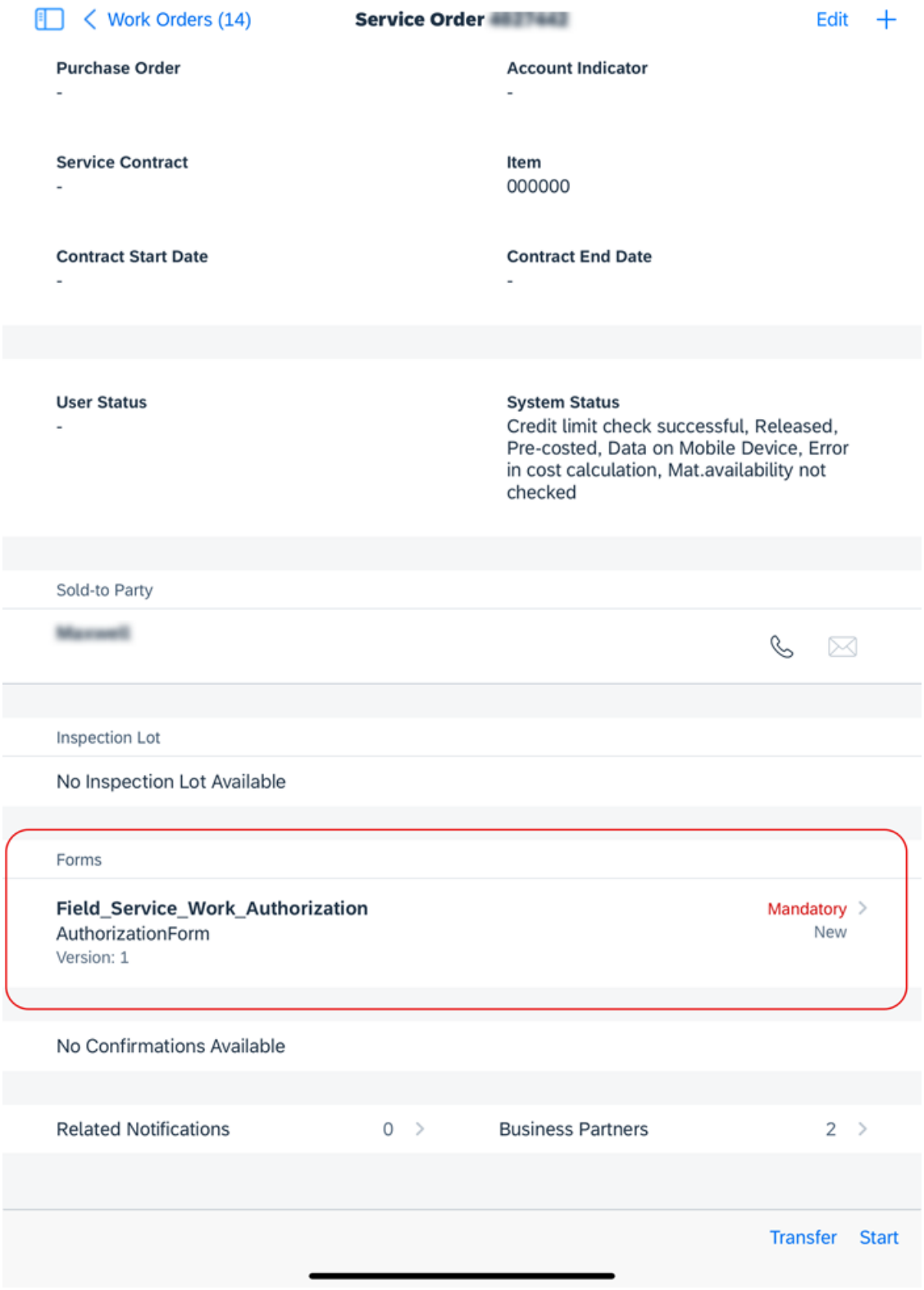
Using the feature

Perform the following steps to use SAP Dynamic Forms with any of the supported personas or objects mentioned above:

1. On the object's detail page, you can access Forms already attached to the object [page 42], or create a new Form instance as follows:
    1. Tap *Add Form* from in the Quick Action Buttons bar or via the *Add* button in the section header.
    2. You can pre-filter the list of Forms by selecting a *Category*, or select a Form directly from the list.

        > **Note**
        >
        > You can only create Form instances for the object, if the Form template for the object type already exists. For more information, see Identify Form Definitions for Client Download.

2. Once created, you can find the attached Forms in the *Forms* section:

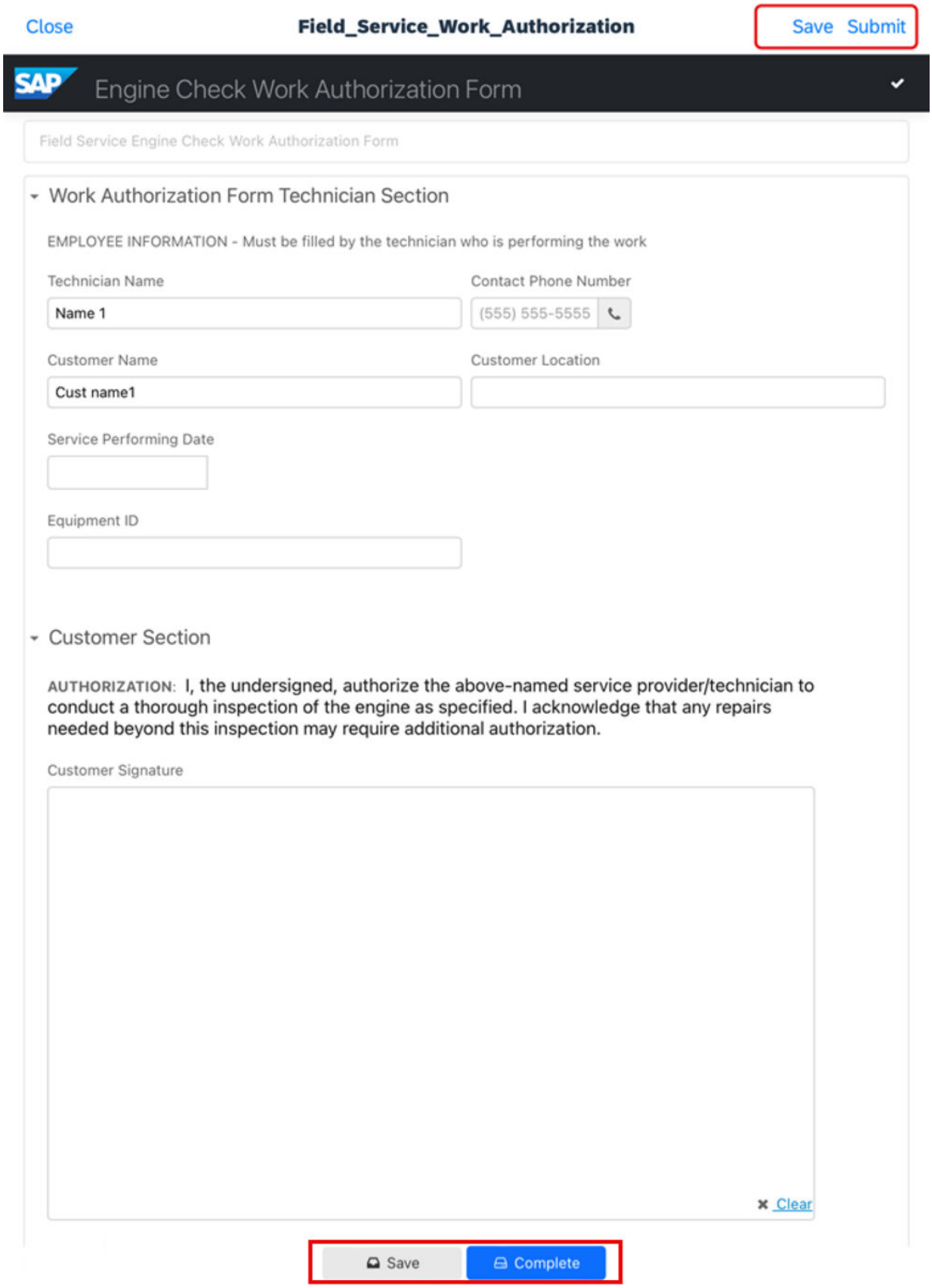


3. Click a Form in the list. You have the following functions when completing a form:
   - Depending on how the Form is structured, fill in all the relevant information.
   - At the top of the screen, you can *Save* and *Submit* the Form.

> **Note**
>
> Please note that once you click *Submit*, you will not be able to reopen the Form and make additional changes to it.

- At the bottom of the screen you can:
  - *Save*: Save the Form as a draft.
  - *Complete*: Set the Form's status to *Completed*.

    > **Note**
    >
    > If you set the Form to *Completed*, you can still *Reopen* it and make additional changes. You can switch between *Completed* and *Reopened* statuses multiple times.


Close
Field_Service_Work_Authorization
Save
Submit
Engine Check Work Authorization Form
Field Service Engine Check Work Authorization Form
Work Authorization Form Technician Section
EMPLOYEE INFORMATION - Must be filled by the technician who is performing the work
Technician Name
Name 1
Contact Phone Number
(555) 555-5555
Customer Name
Cust name1
Customer Location
Service Performing Date
Equipment ID
Customer Section
AUTHORIZATION: I, the undersigned, authorize the above-named service provider/technician to conduct a thorough inspection of the engine as specified. I acknowledge that any repairs needed beyond this inspection may require additional authorization.
Customer Signature
Clear
Save
Complete

2.16 Using Samsung Knox Capture

On Samsung devices, users can scan QR codes by the Knox Capture integration, which will allow them to:

- Scan a single QR code to navigate directly to an object's detail page.
- Scan multiple QR codes at once to save/issue multiple objects.
- Trigger the scanning function directly by pressing the **Active** or **XCover** keys on supported Samsung devices.

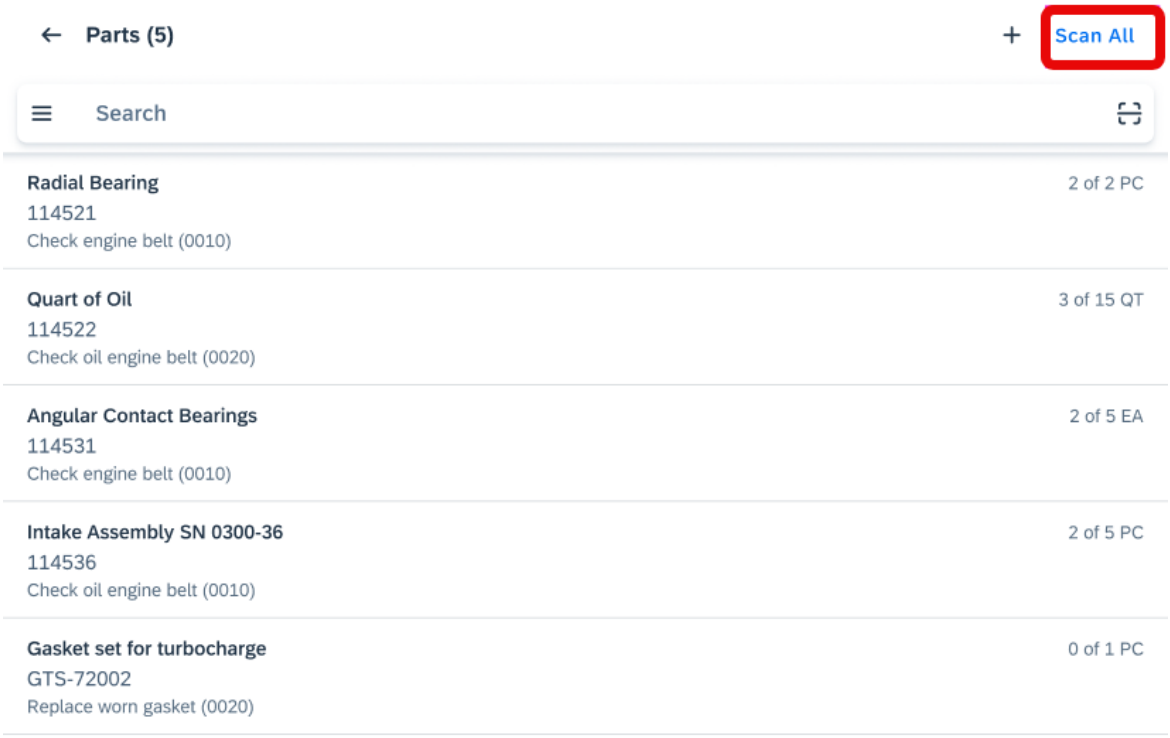
> **Note**
>
> - The **Active** / **XCover** buttons will trigger the scanning feature only if the SAP Service and Asset Manager application is open.
> - For more information about how to configure this feature for SAP Service and Asset Manager, see Samsung Knox Capture Configuration.
> - This feature is a third-party integration by Samsung. For more information and the list of supported devices, refer to the official Samsung Knox documentation .

Scanning a single code

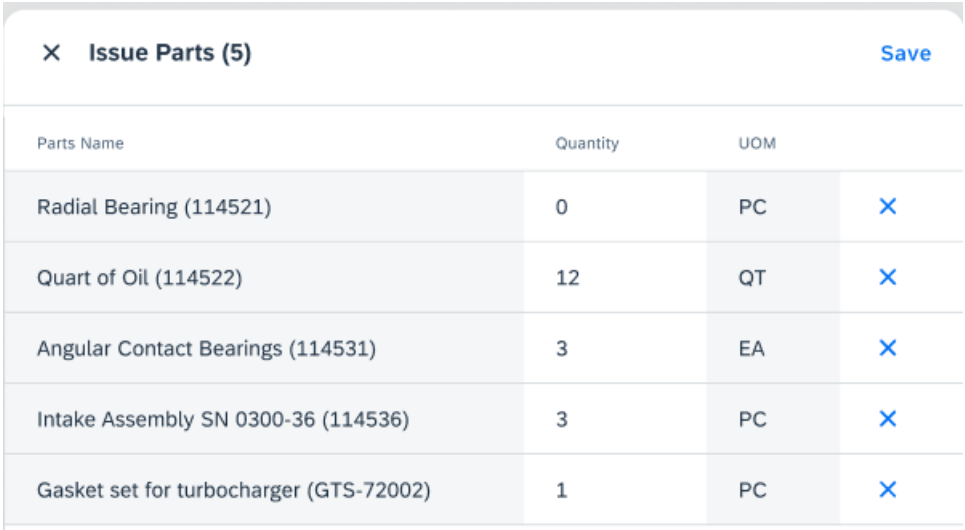
1. On any objects' overview, list or details pages that support single scanning, press the **Active**/**XCover** button on the device.
2. The **Knox Capture** camera app opens, scan the QR code and tap *Done*.
3. You will be navigated directly to the corresponding object's detail page.

Scanning multiple codes

1. On any objects' overview, list or details pages that support multiple scanning, press the **Active**/**XCover** button on the device or tap *Scan All*.



2. The **Knox Capture** camera app opens, scan all the QR codes and tap *Done*.
3. You can edit the list of auto-populated objects.



4. Tap *Save*.

2.17 Using Zebra Scanner

On Zebra devices, users can scan barcodes by using the Zebra Scanner integration, which will allow them to:

- Scan a single barcode to navigate directly to an object's detail page.

- Trigger the scanning function directly on Overview or List pages, by pressing the barcode scanner button on the device.

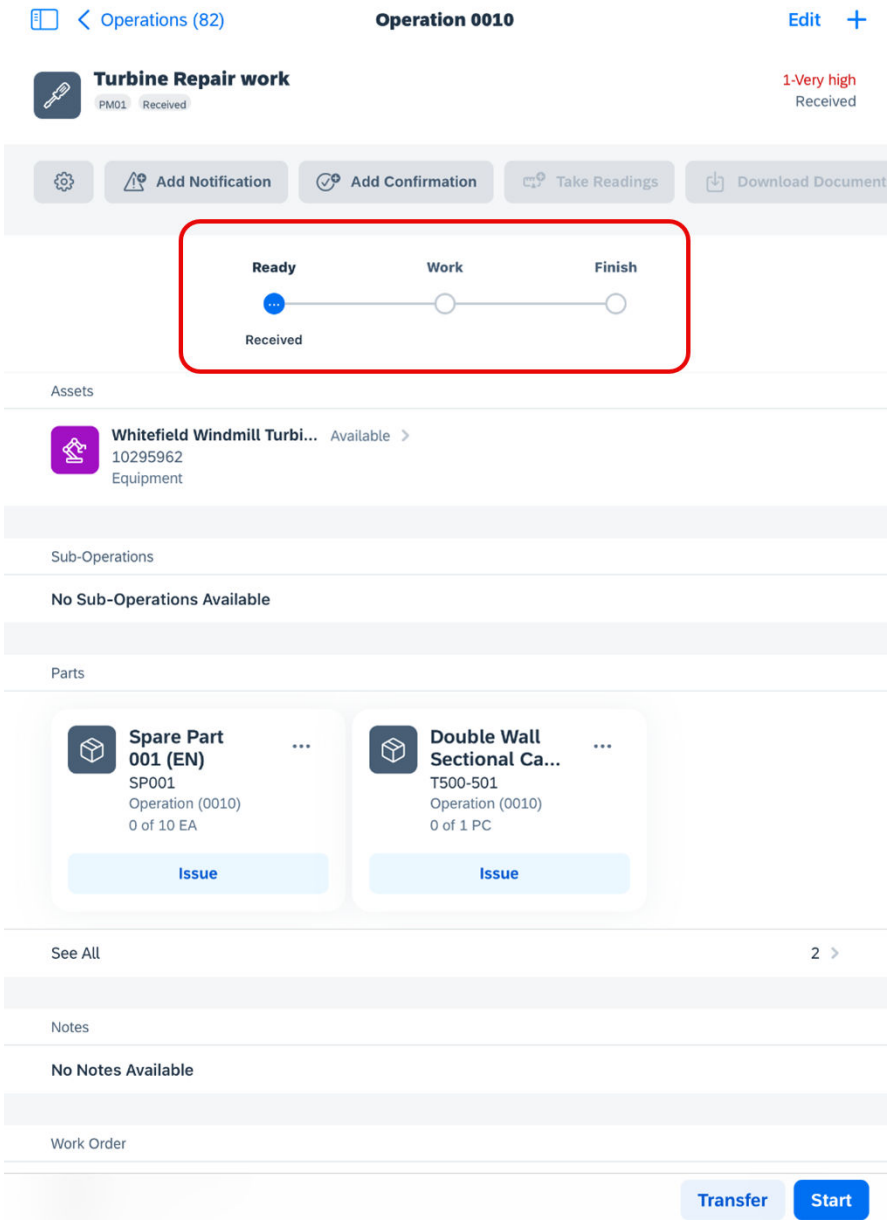
> **Note**
>
> - The barcode scanner button will trigger the scanning function only if the SAP Service and Asset Manager application is open.
> - For more information about how to configure this feature for SAP Service and Asset Manager, see Zebra Scanner Configuration.
> - This feature is a third-party integration by Zebra. For more information and the list of supported devices, refer to the official Zebra documentation and Zebra Products and Software Support .

Scanning a barcode

1. On any Overview or List pages that support single scanning, press the barcode scanner button on the device and use the device's laser scanner to scan the barcode.
2. You will be navigated directly to the corresponding object's detail page.

2.18 Using Guided Workflows

When you are working on an object, for which a guided workflow is defined, on the details page of the object a progress tracker will be displayed. This will help you to have a clear overview of the status of a given procedure and not to miss any steps while completing your tasks related to the object.



Guided workflows are available for the following objects within the Maintenance Technician (Pro) and Field Service Technician (Standard/Pro) personas:

- Work Orders [page 50]
- Operations [page 58]
- Service Orders
- Service Items

- Notifications [page 102]

> **Note**
>
> For more information about how to configure guided workflows, see Guided Workflow Configuration.

3 Working with Work Orders

3.1 Work Order Detail Screen

A work order is a task that is assigned to you. A work order is based on customer requests or it's created internally within the organization.

General Overview

The Work Order detail screen gives you a brief description of the order, the order location, and the required steps to perform the work. After you tap on an order listing, you're taken to the Work Order detail screen for the specific order.

The order header lets you know the status, priority, and due date. The header also gives you a brief description of the operations and the work required to perform the job. If analytics for the order are available, they're displayed here, to assist you in diagnosing the issue.

> **Note**
>
> If a guided workflow is defined for the Work Order, a progress tracker will be displayed with steps and status information specific for this object. See Using Guided Workflows [page 48].

The *Location* is displayed underneath the header. Depending on your site, the location could be a factory, a building campus, or in a city. If your site has maps enabled, you can use the maps functionality and GPS to help you locate your site.

After reaching your site location, use the *Operations* section to help you perform and complete your job. You can tap on any individual operation for more information, such as documents or more people to contact, if needed, for that operation, or step.

The *System Status* field shows you what business transaction was performed for an object. System statuses are automatically updated based on the business transactions executed either in the backend or on the mobile client. You can set the *User Status* to change further settings for a status object. You can manage customer specific statuses via user statuses and they also enable you to change more settings of the business processes managed by the system status. You can add and delete user statuses manually in the backend system when you perform business transactions.

The *Follow-On Work Orders* section displays even if there are no follow-on maintenance requests attached to the maintenance order. Tap on an item in the list to view details, if any.

If there are inspection checklists associated with your work order, they're listed in the *Checklists* section. Tap on a checklist to view the checklist.

If there's any equipment associated with your work order, they're listed in the *Equipment* section. To see all of the equipment details for the equipment, tap on an equipment, or asset. Equipment details vary depending on

the asset, but can include measuring points, the history of the asset, and any documents associated with the equipment.

The *Functional Location* section also displays equipment, but in this case, the equipment is tied to a specific place where you perform a maintenance-based task. Tap on the equipment in the Functional Location section to view the Functional Location detail screen and to perform maintenance duties on the equipment. For more information, see the Functional Location Overview [page 133] topic.

The *Follow-On Orders* section only displays if follow-on work orders are attached to the work order. Tap on a follow-on work order to view details. For more information, see the Viewing or Adding a Follow-On Work Order [page 56] topic.

The *Assembly* section displays groups of parts of a technical object that belong together. A technical object can be subdivided into assemblies to separate it into more clearly defined units. These assemblies are used in BOMs (bills of material) and maintenance task lists.

Underneath the Assembly section, there are sections for *Parts*, *Documents*, *Notes*, *Meters, Linear Data,* and *Confirmations*. A number to the right of the section name lets you know how many objects are associated with that section, if any. For example, if two notes are associated with the job you tapped, you see a *2* to the right of the *Notes* field. Tap on any section to see that detail screen.

Tap the + icon at the top right of the screen and select the appropriate menu item to add the following:

- Add Follow-up Work Order: See Adding a Follow-Up Work Order [page 55].
- Add Operation: See How to Work with an Operation or Suboperation Maintenance Activity [page 58]
- Add Part: See Issuing a Part [page 65]
- Take Readings: See Measuring Points and Readings Overview [page 97] and the associated subtopics

Tap the *Edit* menu item to edit the current work order displayed on the Work Order detail screen. To learn how to edit any object in the SAP Service and Asset Manager, including a work order, see the Editing an Object [page 30] topic.

Filtering and Searching

See the following topics for information about using the filtering and search options in general:

- Filtering Objects [page 27]
- Searching for Objects [page 27]

3.2 Changing the Status of a Work Order

Work orders in SAP Service and Asset Manager can have statuses of *Start*, *On Hold*, and *Completed*. You can also Transfer a work order initially assigned to you.

Prerequisites

> **Note**
>
> Please note that **transferring Operations** is **not supported** in the following cases:
>
> - Operations with **Assignment Type 4**.
> - If the Operation is only available on the device (has not been synced yet).
> - If the object is Phase Model-related.

Before you can *Complete* a work order, perform any or all of the following procedures, if necessary. After you complete a work order, you can't perform any more actions to the work order or objects within the work order.

- Issuing a Part [page 65]
- Adding a Part [page 66]
- Adding a Follow-Up Work Order [page 55]
- Adding a Notification [page 107]
- Taking a Single Measuring Point Reading [page 100] or Taking All Measuring Point Readings [page 99]

Context

You can both view and change the status of a work order in the work order detail screen. The current work order status is visible in a gray bubble directly underneath the work order title.

- Once you start a work order, time begins to accrue on that work order. Time stops accruing if you place the work order on hold, then restarts when you set the work order to started. Your time spent on the work order is an accumulation of all time it spends in the *Started* state, until you transfer it or set it to *Complete*.
- You can't change a work order to a status of *Complete* until all the operations and suboperations are set to *Complete*. See How to Work with an Operation or Suboperation Maintenance Activity [page 58] for more information.
- You can complete the work order with AI-assisted speech recognition, instead of manually entering data required for the completion. See Using AI to Complete Your Job [page 79].
- You may be required to add a digital signature before completing the work order. See Adding a Signature [page 71] for more information.
- If the work order contains linear asset management (LAM) readings, you may be required to complete a PM confirmation. See Completing a PM Confirmation on a Maintenance Order [page 79] for more information.

To change a work order status, perform the following steps:

Procedure

1. Click to a work order detail screen, either from the main overscreen or from the map view.

   The *Work Order Detail* screen displays.
2. Tap the current status at the bottom of the screen and select one of the other statuses from the menu options.

Results

The status is changed on the work order details screen but isn't updated in the back end until the next sync.

3.3 Adding a Local Work Order

Add a new work order to perform a specific task and record the details. Create a follow-up work order to an existing work order to complete additional work that wasn't specified on the original job.

Context

The steps to create either a new work order or a follow-up work order is the same. The only difference is that you create a follow-up work order on an existing work order, and you create a new work order as a standalone work order. Work orders are used for invoicing and billing purposes.

If you discover an issue that requires a repair, add a notification. See the topic Adding a Notification [page 107] for more information. If you determine that you must add a new maintenance activity, you can add a new operation. See the topic Adding a Local Operation [page 64] for more information.

You can add a work order to the following objects and views in SAP Service and Asset Manager:

- Map module view
- Work order detail screen (see Adding a Follow-Up Work Order [page 55])
- Notification detail screen
- Functional location detail screen
- Equipment detail screen

Once you add a local work order, work with it as you would a work order that is sent to your device from the SAP back end. You can change the status and log time against it. You're allowed to discard a locally created work order no matter its status. If sync errors occur, you're allowed to fix them. When you sync to the back end, the

work order is automatically assigned to you and appears on your device if the work isn't completed and you didn't transfer it to another person.

Procedure

1. Select *Add Work Order* from the + icon on the *Work Orders* detail screen if you're adding a new work order. Select *Add Follow-Up Work Order* from a specific work order detail screen using the + icon if you're adding a follow-up work order.

   The Add Work Order screen displays.
2. If you're creating a follow-up work order, many of the fields are already filled with the current work order information. Tap on the fields and change the information if they need editing. If you're creating a new work order, all fields are empty and the following fields are required:
   - Description
   - Planning Plant
   - Type
   - Priority
   - Business Area
   - Work Center Plant
   - Main Center Plant
3. Tap on any of these fields and fill in if needed, as they're optional:
   - Functional Location
   - Equipment
   - Note
4. Add an optional photo to the work order by tapping on the + icon in the *Attached Photos* section. Choose to add the photo either from the *Photo Library* or to *Take Photo*.
5. Tap *Done* when satisfied. Tap *Cancel* at any time to discard your changes and return to the *Work Order* detail screen.

Results

Your new local work order is created and added to the Work Order detail screen. The work order is sent to the back end the next time you transmit. Continue working with the work order, though note that you can't discard a work order once you've synced to the back end.

3.4 Working with Related Work Orders

The related work orders and pending work orders detail screen associated with an equipment shows you which work orders are relevant to that equipment, both currently and in the future.

The *Related Work Orders* detail screen in the SAP Service and Asset Manager application displays both historical work orders completed for the current job and pending work orders that are still ongoing for the

current job. Previous work orders are past work orders that are completed, and show both a start date and end date. Pending work orders work orders display a start date only.

Find the *Related Work Orders* section on the *Equipment* detail screen. If you do not see a *Related Work Orders* section, there are no work orders currently associated with the equipment. This section can appear on the *Equipment* detail screen whenever a work order is assigned to the equipment.

Tap the *Related Work Orders* section to access the *Related Work Orders* detail screen. The screen is split into two subscreens:

- **Previous Work Orders:** Past work orders assigned to the work order or the equipment
- **Pending Work Orders:** Current or future work orders assigned to the work order or the equipment

Tap on *See All* on either subscreen to view the complete list of work orders, if the list extends past the first page of the *Related Work Orders* detail screen. Tap on any work order row to view the details of that work order. All work order details are read only.

3.5 Adding a Follow-Up Work Order

If you discover that the site needs additional repairs while you are performing your current work order, you can add a follow-up work order using SAP Service and Asset Manager.

Procedure

1. Click to a work order detail screen, either from the main SAP Service and Asset Manager Overview screen or from the Map view.

   The work order detail screen displays.
2. Tap the + icon and select *Add Follow-up Work Order* from the menu.

   The Add Follow-up Work Order screen displays.
3. Fill in all fields. Note that the `<Description>` field is mandatory. If you do not want to create a follow-on work order, turn the *Follow-On Work Order* switch to off. When done, click *Next*.

   > **Note**
   >
   > The `<Description>` field has a limit of 40 characters.

   The Add Operation screen displays.
4. Change any of the operation fields if necessary. When finished, click *Done*.

Results

The follow-up work order is created. Sync to send the follow-up work order to the back end.

3.6 Viewing or Adding a Follow-On Work Order

When you create a follow-on work order to an existing work order or notification, you create a relationship to the preceding order or operation. This relationship is displayed in the document flow.

You'll create follow-on work orders when you want to create a relationship between the main work order and a follow-on work order. This relationship is displayed in the document flow.

For example, while inspecting an equipment, you discover a defect. You perform the work for the original work order, but you also must document that there's a follow-on activity necessary. Creating a follow-on work order links the work orders together.

Viewing a Follow-On Work Order

To view follow-on work orders, tap the *Follow-On Work Orders* section on the main detail page of a work order. Then tap on a follow-on work order to few its details, such as description, order ID, due date, status, and priority.

Adding a Follow-On Work Order

Use the following procedure to add a follow-on work order to an existing work order:

> **Note**
>
> If the origination work order is still in a LOCAL state (not synced to the back end), you can't add a follow-on work order. If the original work order isn't released from the back end, the follow-on work order option isn't available.

1. Click to the work order or notification detail screen to which you're adding a follow-on work order.
2. Tap the + icon and select *Add Follow-Up Work Order*.
   The Add Follow-Up Work Order screen displays.
3. Ensure the *Follow-On Work Order* toggle switch is selected (it will be selected by default).
4. Fill in all fields. Note that the `<Description>` field is mandatory. When done, click *Next*.
   The Add Operation screen displays.
5. Change any of the operation fields if necessary. When finished, click *Done*.
   The follow-on work order is created. Sync to send the follow-on work order to the back end.

3.7 Follow-on Notification from Work Order

If you discover that the site needs more information while you are performing your current work order, you can add a follow-on notification using SAP Service and Asset Manager. You can create a new notification with a

relationship to the preceding order in the document flow. The new notification takes over the technical object from the preceding order. You can find the relationship in the document flow of both the preceding order and the follow-on notification. This ensures that all necessary details are captured, improving workflow and communication within the service management process.

Context

Create a follow-on notification to an existing work order to add additional information that wasn't specified on the original job.

Procedure

1. Click the *Work Order* detail screen, either from the main SAP Service and Asset Manager Overview screen or from the *Side* menu.

   The *Work Order* detail screen displays.
2. Tap the + icon and select *Add Notification* from the menu.

   The *Add Notification* screen displays.
3. Fill in all fields, choose the type of a notification, and change any of the notification fields if necessary. If you do not want to create a follow-on notification, turn the *Follow-On Notifications* switch to off.

   > ⓘ Note
   >
   > The `<Description>` field is mandatory. It has a limit of 40 characters.
4. When finished, click *Done*.

Results

The follow-on notification is created. Sync to send the follow-on notification to the back end.

3.8 How to Work with an Operation or Suboperation Maintenance Activity

Operations and suboperations describe a sequence of maintenance activities.

Context

> **Note**
>
> The way you work with a maintenance activity depends on the persona you're using. Some functions described may not be available for every persona.

An operation includes the date and time, status, work center, and other controlling information for an individual maintenance task. In the operation text, or steps, the maintenance activity is described. To complete the maintenance activity, follow the steps in the operation text.

The Maintenance Technician persona uses suboperations. A suboperation represents an additional level of detail for an operation and is situated hierarchically below an operation. Multiple suboperations can exist under an operation. Suboperations are often used when multiple work centers are required. Suboperations are also used when employees with varying qualifications and skills are working simultaneously on the same operation.

> **Note**
>
> As of 2410 release, depending on which layout you choose in Personalization Settings [page 24], the *Sub-Operation* details screen will be displayed in New or Classic views.

You can access an *Operation* detail screen by multiple ways:

- Tap the *Operations* section on the *Overview* screen in the KPI section of the SAP Service and Asset Manager application. Here, you can see the number of the operations. The *Operations* detail screen displays. Select your desired operation from the list to display its *Operation* detail screen.
- Tap the *My Operations* section on the *Overview* screen of the SAP Service and Asset Manager application. Tap on one of operations to access the operation screen. Or, tap *See All* to navigate to a list of the objects.
- Tap the hamburger menu icon on the top left of the screen to open the *Side* navigation menu. Tap *Operations* to open the list of all operations.
- Tap the *Operations* section on a *Maintenance Order* detail screen. Select your desired operation from the list to display its *Operation* detail screen.

Procedure

1. Click to your selected *Operation* detail screen using the navigational path of your choosing. For more information, read the *Context* section of this procedure.

   The *Operation* detail screen displays.

> **Note**
>
> If a guided workflow is defined for the Operation, a progress tracker will be displayed with steps and status information specific for this object. See Using Guided Workflows [page 48].

2. To ensure that you understand the directions before you start work, review all operation and any suboperation information.
   a. Tap on the *Parts*, *Unplanned Parts* sections and ensure that you have all parts available before you start work. If you don't have all parts available, put the maintenance order on hold, and issue more parts to complete the operations successfully.
   b. If any documents are available in the *Documents* tab, tap on them to download them. View them before starting the operation.
3. Tap on each operation and suboperation, and the related maintenance request or order, if any, and follow the instructions.
4. If the operation or suboperation contains equipment, perform a reading on the equipment. See Taking a Single Measuring Point Reading [page 100] for details.
5. Once each operation or suboperation is finished, tap *Confirm* at the bottom of the screen.
   a. You can complete the operation or suboperation with AI-assisted speech recognition, instead of manually entering data required for the completion. See Using AI to Complete Your Job [page 79].
   b. If a signature is required to complete the operation, suboperation, work order, or service order, a digital signature screen appears. See the Adding a Signature [page 71] topic for more information.
   c. If the work order contains Quality Management (QM) notifications, see the *Working with Quality Management* chapter in the *SAP Service and Asset Manager User Guide - Maintenance Technician Persona* for required QM procedures.

Results

All operations and suboperations are marked as *Complete*.

Next Steps

Issue the parts that you used when working through the work order or service order operations or suboperations. See Issuing a Part [page 65] for more details.

Once all operations and suboperations are completed, and you've issued all necessary parts, you can complete the work order or service order. See the following topics for more information:

- Maintenance Technician: Changing the Status of a Work Order [page 52]
- Field Service Technician: Changing the Status of a Service Order

3.8.1 Quick Confirmation of Operations

As a Maintenance Technician, you can select multiple Operations on the Operations List screen and confirm them all simultaneously as a bulk action.

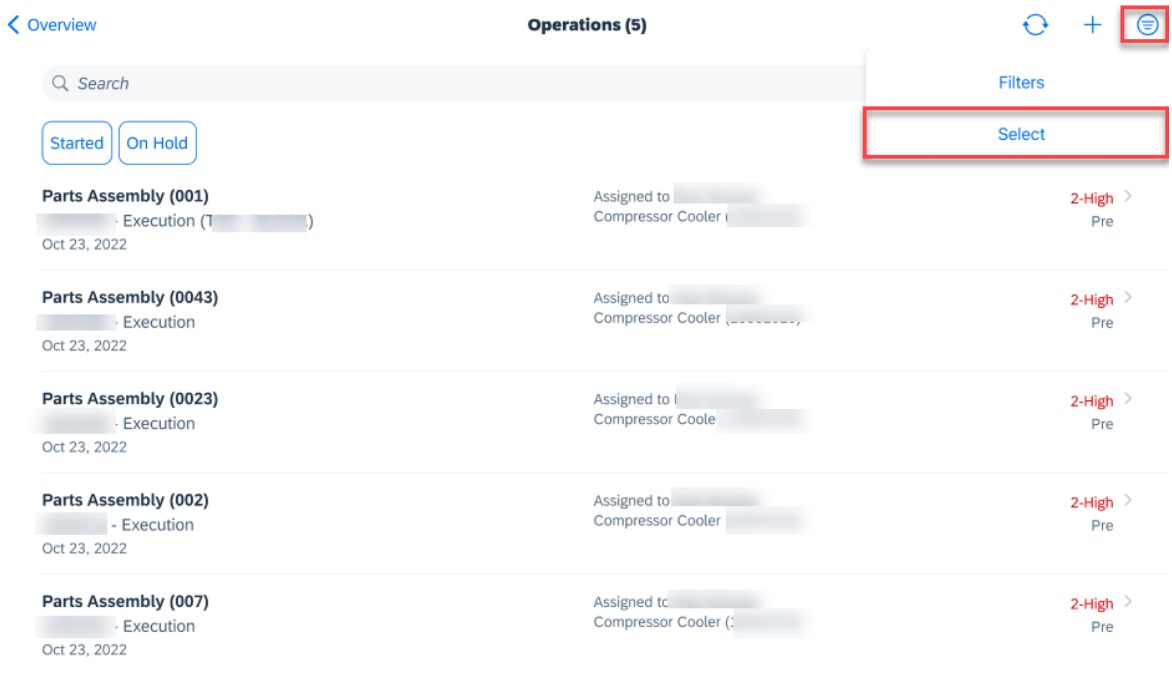
Context

> **Note**
>
> - This feature is applicable **only** for the following assignment types:
>   - **Assignment Type 1** - Header-level person responsible for the work order
>   - **Assignment Type 2** - Operation-level personnel number of the work order
>   - **Assignment Type 6** - Operation-level work center
>   - **Assignment Type 8** - Header-level of work center
> - If you are **not** a Supervisor, you can only confirm the Operations that are assigned to you.

To confirm multiple Operations as a bulk action, perform the following steps:

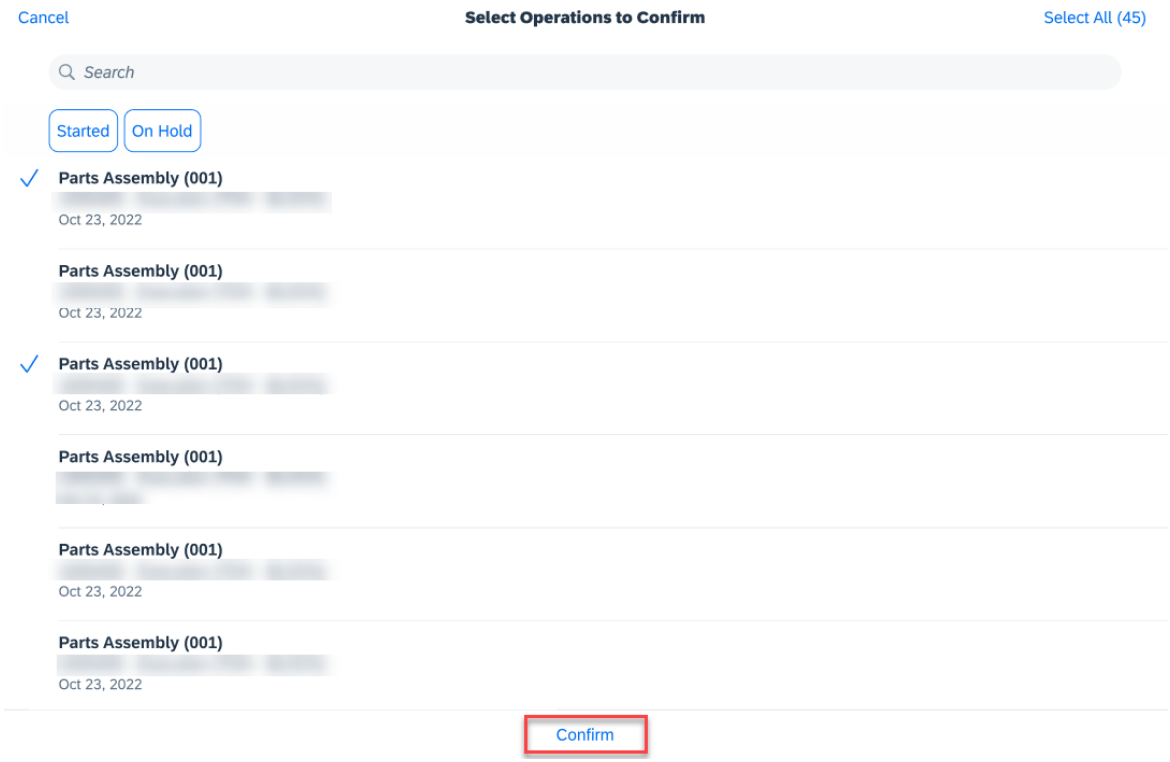
Procedure

1. On the Operations List page, tap the *Filter / Select* icon at the top-right of the screen and tap *Select*.

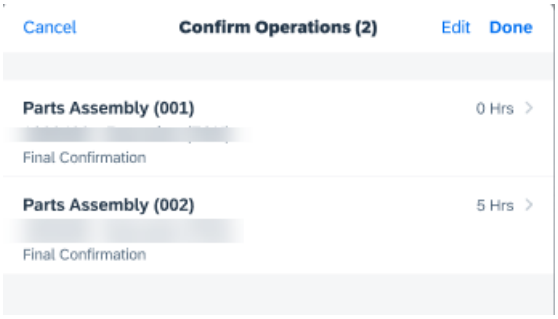


   The list will be filtered to show only the Operations that are available for you to confirm.

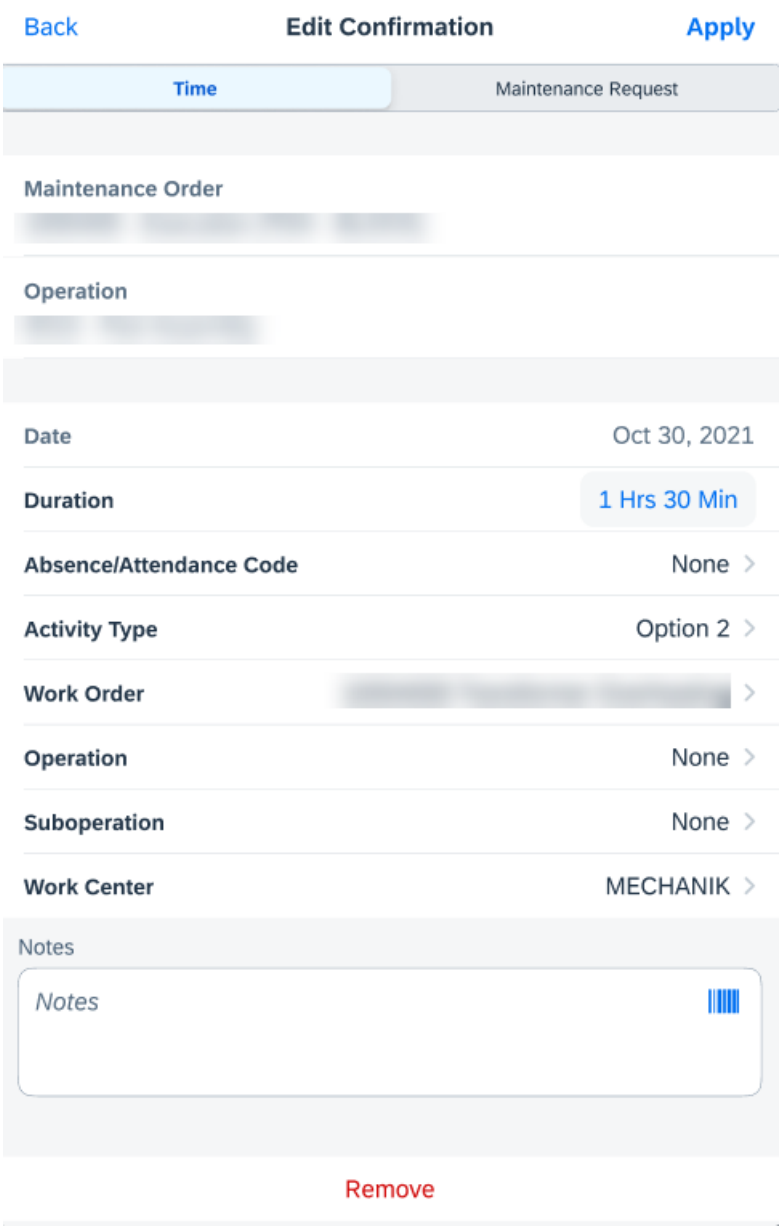
2. From the list, select the Operations you want to confirm and tap *Confirm*.



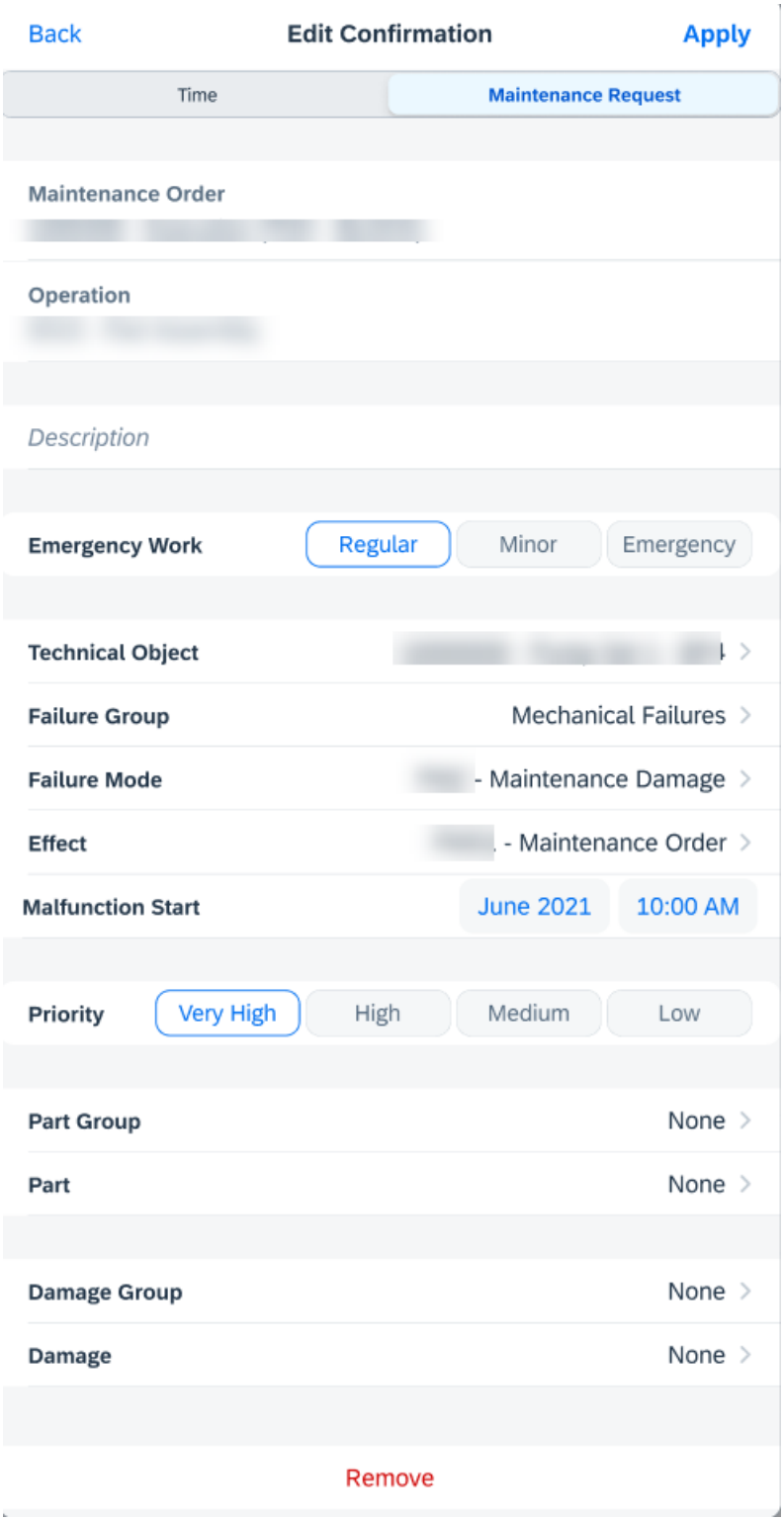
The *Confirm Operations* screen displays:



3. On the *Confirm Operations* screen, you can still edit or remove the confirmations of each Operations:
   - Under the *Time* tab you can change the default duration to your preference.



- Under the *Maintenance Request* tab you can add and change details to the maintenance activity.



4. When everything is set, tap *Done* at the top-right of the *Confirm Operations* screen.

> **Note**
>
> Operations that you confirm will disappear from the initial filtered list (see Step 2 [page 61].

3.8.2 Adding a Local Operation

Operations describe a sequence of maintenance activities. You can add an operation to an existing work order.

Context

If you discover an issue that requires a repair, add a notification. See the topic Adding a Notification [page 107] for more information. Add a work order to perform a specific task and record the details. Create a follow-up work order to an existing work order to complete more work that wasn't specified on the original job. If you determine that you must add a maintenance activity, you can create an operation. See the topic Adding a Local Work Order [page 53] for more information.

Once you add a local operation, work with it as you would an operation that is sent to your device from the SAP back end. You can change the status and log time against it. You're allowed to discard a locally created operation no matter its status. If sync errors occur, you're allowed to fix them. When you sync to the back end, the operation is automatically assigned to you and appears on your device if the work isn't completed and you didn't transfer it to another person.

Procedure

1. Select *Add Operation* from the + icon on the *Work Orders* detail screen.

   The Add Operation screen displays.
2. Many of the fields are already filled with the current work order information. Edit these fields if desired by tapping on them and changing the information.
3. Tap *Save* when satisfied with your additions. To exit out of the *Add Operation* screen without saving, tap *Cancel* at any time to return to the *Work Orders* detail screen.

Results

Your new local operation is created and added to the *Operations* detail screen, available from the *Work Orders* detail screen. The operation is sent to the back end the next time you transmit. The operation is sent to the back end the next time you transmit. Continue working with the operation, though note that you can't discard an operation once you've synced to the back end.

3.8.3 Working with Parts

Parts, or components, are materials needed for a maintenance order. Examples of parts are screws, computer monitors, or oil pumps.

To access the *Parts* detail screen, tap on the *Parts* and *Unplanned Parts* sections in the *Operation* detail screen of your selected maintenance order. The *Parts* or *Unplanned Parts* detail screen lists all parts required to complete the operation. To open the part detail page, tap on a part on the list.

See the following procedures for information on how to work with parts:

- Issuing a Part [page 65]
- Adding a Part [page 66]
- Returning a Part [page 68]

3.8.3.1 Issuing a Part

Parts, or components, are materials needed for a work order. Examples of parts are screws, computer monitors, or oil pumps.

Context

After you finish your operations and suboperations, issue the parts you used to perform the work order. Spare parts, or service parts, are issued when they are used in production and plant maintenance. Keeping careful track of these parts helps your organization maintain a precise inventory and ensures that parts are available to all team members when they need them.

> **Note**
>
> If the work order is set to *Complete*, you cannot perform any more actions to the work order, including issuing or adding parts.

Procedure

1. Click to a work order detail screen, either from the mainSAP Service and Asset Manager Overview screen or from the *Maps* view.

   The work order detail screen displays.
2. Tap the *Parts* tab.

   The Parts detail screen displays.
3. Tap the part on the list that you wish to issue.

   The specific part detail screen displays.

4. Tap the + icon and select *Issue Part*.

   The Issue Part screen displays.
5. The *Plant* and the *Part* fields are automatically filled in for you. Tap in the `<Quantity>` field and type in how many parts were used. Then tap in the `<Storage Location>` field and select the storage location where you obtained the part.
6. When finished, tap*Save*

   The part is issued.
7. Continue to issue parts, following *Steps 1 - 6*, until all parts are issued for the work order.

Results

You have issued all parts for your work order. If you have used a part that was not on your parts list, see the Adding a Part [page 66] procedure.

Next Steps

Once all operations and suboperations are complete and all parts are issued, you can complete the work order itself. See Changing the Status of a Work Order [page 52]. To return unused parts after finishing the work order, see Returning a Part [page 68].

3.8.3.2 Adding a Part

Parts, or components, are materials needed for a work order. Some examples of parts are screws, computer monitors, or oil pumps.

Context

Most of the time, when you're working through your task list, all of the parts are already listed and waiting for you to issue after you finish your operations list. If all parts weren't originally listed on your parts list, you can add a part or parts to your work order to account for all of the parts used on the work order.

You can add a part from a work order, a piece of equipment, or from a part listed on a bill of materials.

> **Note**
>
> If the work order is set to *Complete*, you can't perform any more actions to the work order, including issuing or adding parts.

Procedure

1. Click to a detail screen of a work order, either from the main SAP Service and Asset Manager Overview screen or from the *Maps* view.

   The *Work Order* detail screen displays.
2. Tap the *Parts* tab.

   The Parts detail screen displays.
3. Tap the + icon.

   The Add Part screen displays.
4. To perform more than a local search on your mobile device for parts, ensure that your device is online and toggle the *Online Search* button to *On*. Note that if you aren't online, your search defaults to your local parts list.
5. Fill in all of the fields to add your desired part by tapping in the fields and selecting from the various options presented to you, or by typing in selections in the fields.
   a. You can manually add a part that isn't available in your plant by selecting *Text Item* and then filling out the *Description* field that appears. You can't issue manually entered parts, however.
   b. You can either search by serial number or physically scan a part to add it to the operation if serial numbers are available on the part. After you either scan or select apart by serial number, the part is added with a default quantity of 1.
6. When all fields are entered, tap *Save* to save and complete the part addition. Once you choose *Online Search*, some additional fields are available for you to fill out for your search.
   a. The unrestricted quantity available displays as a field during online parts search. You can add one or more of the selected part, up to the number listed as the available unrestricted quantity.
   b. If you select a quantity of your chosen part that is greater than the available unrestricted quantity, a warning displays. Tap *OK* to exit the warning. Then correct the quantity.

Results

Your part is added to the Parts list. You can now issue the part. See Issuing a Part [page 65] for more information.

See Editing an Object [page 30] for general information on how to edit objects in SAP Service and Asset Manager. Note that you can only edit a local part. That is, if you've added a part you searched for and added using *Online Search*, you can't edit that part.

Next Steps

Once all work order operations and suboperations are complete and all parts are issued, you can complete the work order itself. See Changing the Status of a Work Order [page 52].

3.8.3.3 Returning a Part

Parts, or components, are materials needed for a work order. Examples of parts are screws, computer monitors, or oil pumps.

Context

Once you have added parts, you can return any unused parts added to the work order.

> **Note**
>
> If the work order is set to *Complete*, you can't perform any more actions to the work order, including issuing or adding parts.

Procedure

1. Click to a work order detail screen, either from the mainSAP Service and Asset Manager Overview screen or from the *Maps* view.

   The Work Order detail screen displays.
2. Tap the *Parts* tab.

   The Parts detail screen displays.
3. Tap an individual part you wish to return.

   The Part screen for the individual part displays.
4. Tap *Return*, found on the top right of the screen.

   The Return Part screen displays.
5. Fill out the quantity of the part you're returning in the `<Quantity>` field. Fill out other fields as needed. When finished, tap *Done*.

   A message displays saying the part is returned. If you've returned the entirety of that part, the *Return* menu option disappears.

Results

Your part is returned to its storage location. You can now add and reissue the part, unless you've manually entered a part that wasn't available in your plant. See Adding a Part [page 66] and Issuing a Part [page 65] for more information.

See Editing an Object [page 30] for general information on how to edit objects in SAP Service and Asset Manager. Note that you can only edit a local part. That is, if you've added a part you searched for and added using *Online Search*, you can't edit that part.

Next Steps

Once all work order operations and suboperations are complete, all parts are issued, and unused parts are returned, you can complete the work order itself. See Changing the Status of a Work Order [page 52].

3.8.4 Managing PRTs

Unlike a fixed asset, production resources and tools (PRTs) are moveable (not stationary) operating resources that are required to perform an operation or suboperation and can be used repeatedly. In SAP Asset Manager, PRTs are based on equipment or material objects.

Equipment PRTs are maintained and serviced at regular intervals. You track the stock quantity of Material PRTs through the application.

You can add or edit PRT equipment details on an operation or a suboperation.

You can add a PRT resource by scanning serial numbers, if serial numbers are available.

Working with PRTs

To access the PRTs detail screen, navigate to an individual work order and tap *Operations*. From the Operations detail screen, tap the *PRTs* section to view all the details of the PRT. From the main PRT detail screen, you can see the equipment, material, and any miscellaneous items attached to the work order.

If a measuring point is associated with the PRT, a measuring point graph is displayed. Tap on the graph to show details of the measuring point. From the Measuring Point detail screen, you can take a reading of the measuring point. Tap on *Take Reading* to take a reading. See the Taking a Single Measuring Point Reading [page 100] procedure for details on how to take a reading.

Filtering PRTs

You can use the *Filter* icon to filter inspection rounds by PRT. Select *Filter* > *Show Only PRT* to filter only operations or work orders that include PRTs. See the topic Filtering Objects [page 27] for more information.

Adding a PRT Resource to an Operation

You can add a production, resources, and tools resource to any operation or suboperation associated with a work order. To add a PRT:

1. From the main *Overview* screen, tap on *Work Orders*. Then tap on the individual work order that contains the operation or suboperation to which you want to add a PRT.
   The *Work Order* detail screen displays.

2. Tap on the *Operations* section. Then tap the particular operation to which you want to add a PRT.
   The *Operation* detail screen appears.
3. Tap on the *PRT* section. Then tap the + icon and select *Add Equipment*.
   The Add Equipment screen displays.
4. Navigate through the Add Equipment screens until you are through adding the new PRT equipment. When complete, tap *Done*.
   1. If serial numbers are available on the PRT resource, you can either search by serial number or physically scan a part to add it to the operation. After you either scan or select a PRT resource by serial number, the PRT is added with a default quantity of 1.

   The new PRT is added to the operation or suboperation.

Editing a PRT Resource

You can edit various fields in a PRT resource object. Select a single PRT in the *PRT* section to display the *Equipment* detail screen of the PRT. Then tap *Edit* to edit the object. For more information on editing an object, see the Editing an Object [page 30] topic.

Discarding a PRT Resource

You can discard a locally created PRT resource object. Select a single PRT in the *PRT* section to display the *Equipment* detail screen of the PRT. Then tap *Discard* at the bottom of the screen to edit the object.

3.9 Using an Object List

In SAP Service and Asset Manager, a technical object list is associated with a work order or a service order. A technical object list is an object worklist configured to meet specific requirements of the customer.

A technical object serves a specific purpose or function, such as a piece of equipment. A technical object list displays the most important pieces of information about the equipment and functional locations.

Displaying Object Lists

Tap the *Object Lists* section on a selected order detail screen. The *Object Lists* screen displays. In each object list row, you can see the associated material, equipment, notifications, and functional locations for that object.

Tap on any object in the object list to display the *Object List* detail screen. Here, you can tap any *Material*, *Equipment*, *Functional Location*, or *Notification* object to access the detail screen for that object.

Adding to Object Lists

Navigate to an individual technical object detail page. You can create and assign notifications to an operation by tapping the + icon. You can also assign equipment to the object so that it's listed in the technical object list of the operation.

For more information, see the following topics:

- Adding a Notification [page 107]
- Installing Equipment [page 95]

3.10 Adding a Signature

Adding a Signature as the Maintenance Technician Persona

Your job site may require the application to collect and capture your signature before setting the status of work orders, operations, or suboperations to *Complete*.

Use the following procedure to add a signature to either an operation, suboperation, a work order:

1. Select a work order, operation, or suboperation to complete.
2. Set the status to *Complete*. For information on changing object status, see Changing the Status of a Work Order [page 52].
3. When the *Time* screen displays, ensure you add any additional time needed. For information on adding time, see the *Working with Time* chapter in this guide.
4. If a signature is required or optional, the *Signature* screen displays. Use your finger or a stylus to add your signature.

Results

When you complete a signature on a work order, a *Signed* tag appears in the *Details* section of the work order.

When you complete a signature on either an operation or a suboperation, a *Signature* line appears in the *Details* section of the operation or suboperation, showing the date and time of the signature.

Find the signature file in the *Documents* section of a work order, operation, or suboperation.

Adding a Signature as the Field Service Technician Persona

Your job site may require the application to collect and capture your signature before setting the status of service orders to *Complete*.

Use the following procedure to add a signature to a service order:

1. Select a service order to complete.
2. Set the status to *Complete*. For information on changing object status, see Changing the Status of a Work Order [page 52].
3. When the *Time* screen displays, ensure you add any additional time needed. For information on adding time, see the *Working with Time* chapter in this guide.
4. If a signature is required or optional, the *Signature* screen displays. Use your finger or a stylus to add your signature.

Results

When you complete a signature on a work order, a *Signed* tag appears in the *Details* section of the work order.

When you complete a signature on either an operation or a suboperation, a *Signature* line appears in the *Details* section of the operation or suboperation, showing the date and time of the signature.

Find the signature file in the *Documents* section of a work order, operation, or suboperation.

3.11 Using Inspection Checklists

Use an inspection checklist to inspect one or more pieces of equipment.

> ⓘ Note
>
> Checklists can be accessed from the *Home Screen*, *Side Navigation Bar* and from the related *Work Order*'s detail screen.

In a production process, it is sometimes necessary to carry out inspections to ensure the quality of a product. An inspection checklist documents a request for an inspection. Inspection characteristics are assigned to the inspection checklist. An inspection characteristic defines what needs to be inspected. A distinction is made between qualitative characteristics and quantitative characteristics.

An inspection checklist is created for a work order on the back end. Characteristics are assigned to individual operations in the order. The characteristics define the inspection requirements. You are then assigned to the work order and associated inspection checklist in SAP Service and Asset Manager.

The *Details* section shows you details about the entire inspection checklist.

The *Equipment* section shows the equipment associated with the inspection checklist.

Underneath the *Equipment* section is a list of characteristics associated with the equipment. Tap on an individual characteristic to view its detail screen.

> ⓘ Note
>
> For more information about how to record characteristic results or defects, see:
>
> - Recording Characteristics Results on an Inspection Checklist [page 73]
> - Recording Defects [page 78]

3.11.1 Recording Characteristics Results on an Inspection Checklist

To complete an EAM operation, all open inspection lots and their associated characteristics must be measured, recorded or valuated.

Context

> **Note**
>
> You might need special pre-configuration in back-end to record, validate, or synchronize inspection characteristics. For information on how to configure this feature, refer to the Quality Management Configuration documentation and the Inspection Lots, PM/EAM Checklists topics.

Checklists can be accessed from the *Home Screen*, *Side Navigation Bar* and from the related *Work Order*'s detail screen.

To record results on a checklist, perform the following steps:

Procedure

1. On the *Work Order* detail screen, tap an item in the *Checklist* section.
2. On the *Checklist* detail screen, tap on *Record Results* at the top of the screen.
3. Depending on your *Profile Settings*, the *Record Results* screen will be displayed in a *Table* or *List* view. See subsequent steps for:
   - Recording Results in Table View [page 74]
   - Recording Results in List View [page 75]

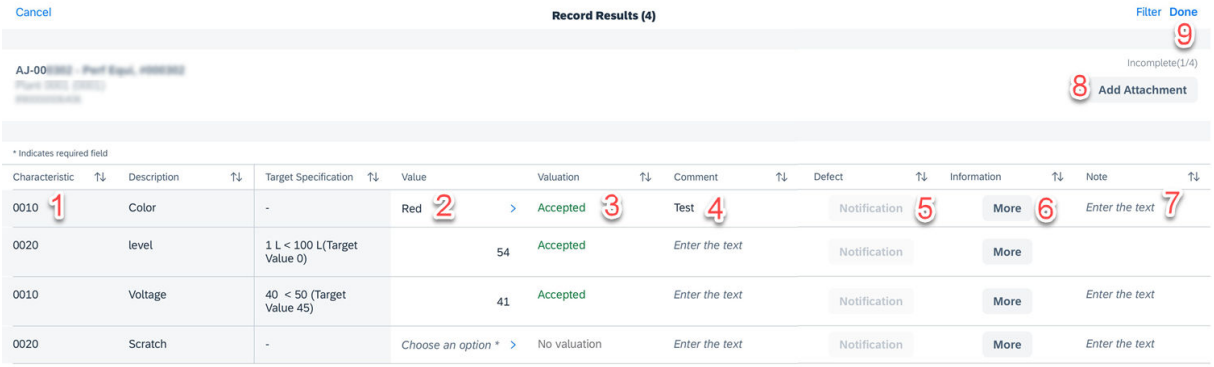
   > **Note**
   >
   > For more information about switching between *Table* and *List* views, see Personalization Settings [page 24].

3.11.1.1 Recording Results in Table View

Context

To record characteristics results in table view for an inspection checklist, perform the following steps:

> **Note**
>
> - For more information about **Editable Data Tables**, see Working with Editable Data Tables [page 37].
> - For more information about switching between *Table* and *List* views, see Personalization Settings [page 24].



Procedure

1. On the *Record Results* screen you can see a list of all inspection lots and their associated characteristics.

   > **Note**
   >
   > Target specification is set by default from the back end.

2. Record each characteristic results.

   > **Note**
   >
   > Checklists support **dependent** characteristics; meaning certain inspection characteristics become enabled only, if the value of a corresponding characteristic is **Accepted** or **Rejected**. Based on the dependent characteristics' configuration, the following scenarios apply:
   >
   > - Dependent characteristic will be available to add a record only, if the other characteristic to which it is tied to is **Accepted**.
   > - Dependent characteristic will be available to add a record only, if the other characteristic to which it is tied to is **Rejected**.

- If the valuation of a characteristic changes from **Rejected** to **Accepted** or vice versa, the corresponding dependent characteristics will be enabled or disabled accordingly.

3. Once you entered a value, valuation works automatically.
4. Add comments to the inspection characteristics.

> ⓘ Note
>
> - Adding comments can be optional or mandatory. If a comment field is mandatory, the value you enter will be validated to make sure you record information accurately.
> - You can see all comments on the *Checklist* detail screen.

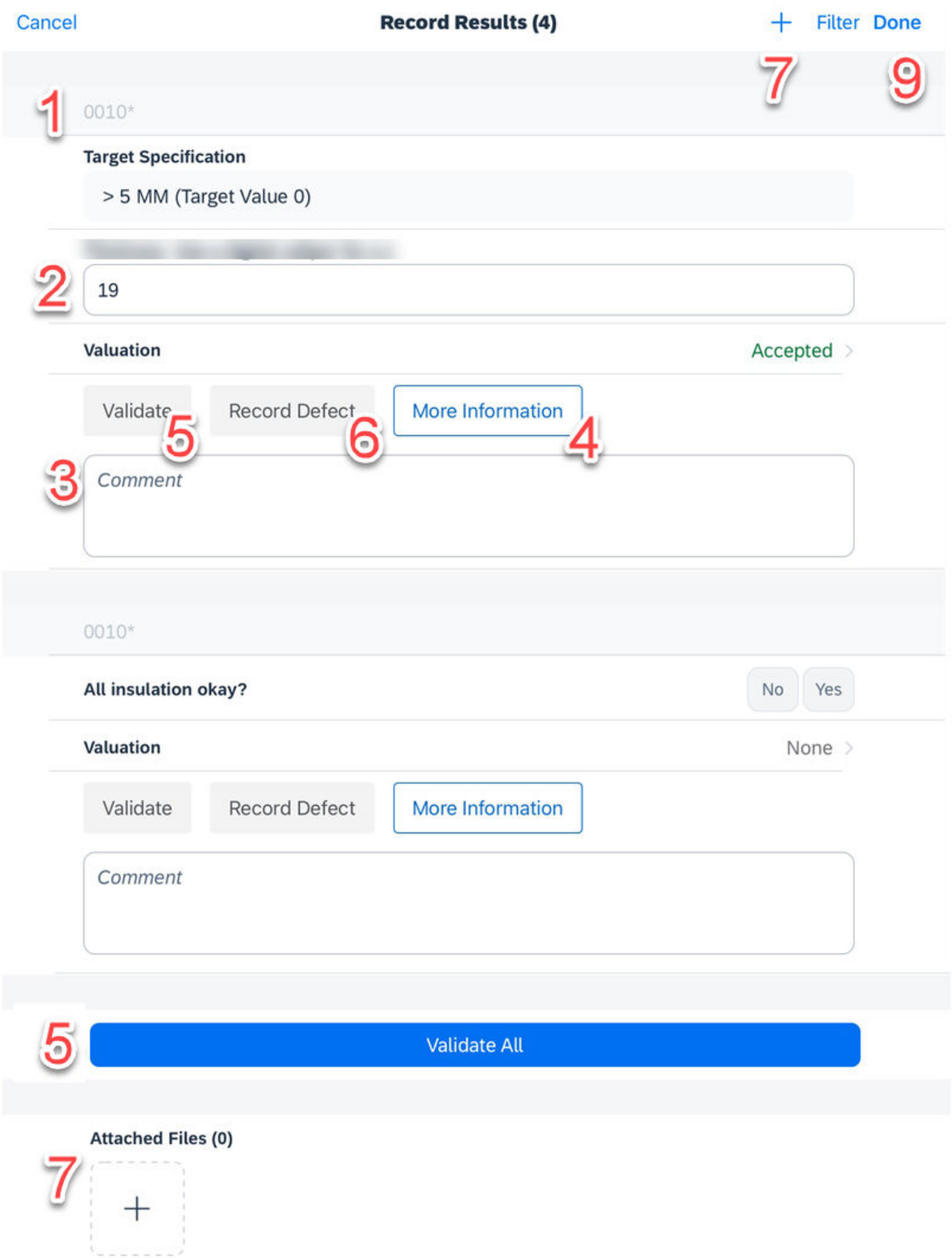
5. If an inspection characteristic is not within bounds, tap *Notification* in the *Defect* column to create one. For more information, see Recording Defects [page 78].
6. For each characteristics, you can tap *More* under the *Information* column to see:
   - Details
   - Target Specification
   - Inspection Method Note
   - Inspection Method Document
   - Notification Item
   - Historical data of values and validations
7. You can enter an additional note for the characteristic.
8. You can add an attachment, which will be visible on the *Checklist* detail screen.
9. When finished recording results, tap *Done*.

3.11.1.2 Recording Results in List View

Context

To record characteristics results in list view for an inspection checklist, perform the following steps:

> ⓘ Note
>
> For more information about switching between *Table* and *List* views, see Personalization Settings [page 24].


Cancel
Record Results (4)
Filter
Done
1
7
9
0010*
Target Specification
> 5 MM (Target Value 0)
2
19
Valuation
Accepted
Validate
Record Defect
More Information
5
6
4
3
Comment
0010*
All insulation okay?
No
Yes
Valuation
None
Validate
Record Defect
More Information
Comment
5
Validate All
Attached Files (0)
7

Procedure

1. On the *Record Results* screen you can see a list of all inspection lots and their associated characteristics.

   > **Note**
   >
   > Target specification is set by default from the back end.

2. Record each characteristic results.

   > **Note**
   >
   > Checklists support **dependent** characteristics; meaning certain inspection characteristics become enabled only, if the value of a corresponding characteristic is **Accepted** or **Rejected**. Based on the dependent characteristics' configuration, the following scenarios apply:
   >
   > - Dependent characteristic will be available to add a record only, if the other characteristic to which it is tied to is **Accepted**.
   > - Dependent characteristic will be available to add a record only, if the other characteristic to which it is tied to is **Rejected**.
   > - If the valuation of a characteristic changes from **Rejected** to **Accepted** or vice versa, the corresponding dependent characteristics will be enabled or disabled accordingly.

3. Add comments to the inspection characteristics.

   > **Note**
   >
   > - Adding comments can be optional or mandatory. If a comment field is mandatory, the value you enter will be validated to make sure you record information accurately.
   > - You can see all comments on the *Checklist* detail screen.

4. For each characteristics, you can tap *More Information* to see:
   - Target Specification
   - Inspection Method Note
   - Inspection Method Document
   - Notification Item
   - Historical data of values and validations
5. Tap *Validate* for each recorded characteristic value or *Validate All* at the bottom to validate all recorded characteristics at once.
6. If an inspection characteristic is not within bounds, tap *Record Defect* to create a *Notification*. For more information, see Recording Defects [page 78].
7. You can add an attachment, which will be visible on the *Checklist* detail screen.
8. Once everthing validated, specify the code to set the usage decision on the inspection lot, on the *Set Usage Decision* screen.
9. When finished recording results, tap *Done*.

3.11.2 Recording Defects

If a characteristic in an inspection lot fails validation, you can create a *Notification* to record the defect. As a result, the *Record Defect* screen is displayed as a notification. The notification must be prefilled, but it can be changed.

Procedure

1. On the *Record Results* screen, tap the *Record Defect* button for which operation you want to record the defect.

   The *Record Defect* screen displays.
2. Type a short description for the defect in the `<Notification Description>` field. Fill out the `<Notification Description>` field as it's mandatory.
3. On the *Record Defect* screen, specify a type, functional location, and an equipment of a defect, if the ones automatically selected aren't the correct ones.
4. Tap the *Breakdown* toggle switch if the defect involves a breakdown.
5. Tap a `<Priority>` box if the automatically selected priority isn't the correct one.

   To add an optional item to the defect, do the following:
6. Add an `<Item Description>`.
7. Select a `<Part Group>` from the list by tapping on the arrow to the right of the field.
8. Select a `<Part>` from the list by tapping on the arrow to the right of the field.
9. Select a `<Damage Group>` from the list by tapping on the arrow to the right of the field.
10. Select a `<Damage>` from the list by tapping on the arrow to the right of the field.

    To add an optional cause to the defect item, do the following:
11. Add a `<Cause Description>`.
12. Select a `<Group>` from the list by tapping on the arrow to the right of the field.
13. Select a `<Code>` by tapping on the arrow to the right of the field.
14. Add a `<Note>`.
15. Type a description in the `<Attachment Description>` field if you're attaching a photo.
16. Tap the photo box to start the attachment process if you're attaching a photo.
17. When finished recording a defect, tap *Done*.

Results

The new defect appears which is linked to the *Checklist Characteristic*. It's marked as a *[LOCAL]* notification, meaning it's only available on your mobile device, until you perform a sync with the back end. The notification is sent to your SAP back end the next time you transmit.

3.12 Completing a PM Confirmation on a Maintenance Order

PM confirmations on operations or maintenance orders capture the time spent on the order as well as technical findings such as repairs performed on an object or damage discovered on an object.

If either an operation or a maintenance order has confirmations associated with it, a *Confirmations* section displays on the *Operations* or *Maintenance Orders* details screen.

Tap the section to view the *Confirmations* detail screen. Tap the + icon to add a confirmation and fill in the fields on the *Add Confirmation Entry* screen, then tap *Done*. The new confirmation appears on the *Confirmations* detail screen. You can now set the operation to *Complete*.

Tap any individual confirmation to view the detail screen for that confirmation. Tap *Edit* to edit the confirmation. If needed tap *Discard*, to delete the confirmation.

3.13 Using AI to Complete Your Job

Prerequisites

- To configure AI-assisted job completion, see AI-Assisted Job Completion - Configuration.
- You can enable or disable this feature in the Personalization Settings [page 24].

Context

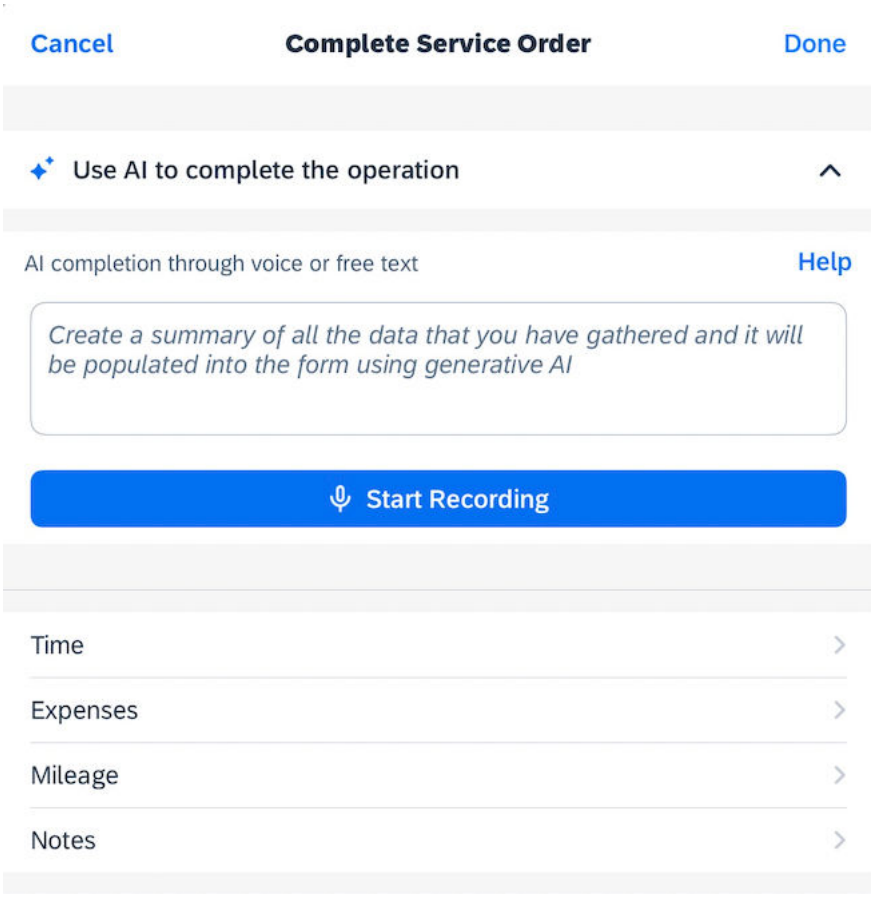
Technicians can complete their job (Work Order [page 50], Service Order, Operation or Suboperation [page 58]) with voice input using natural language and AI, instead of manually entering data required for the completion. The following fields support filling using AI:

- Time [page 127]
- Expense
- Milage
- Note [page 35]
- Defect information [page 102]

> **Note**
>
> For Notifications, only the creation of the Notification Item and all its dependencies (such as Cause, Part, Damage, etc.) is supported.

Procedure

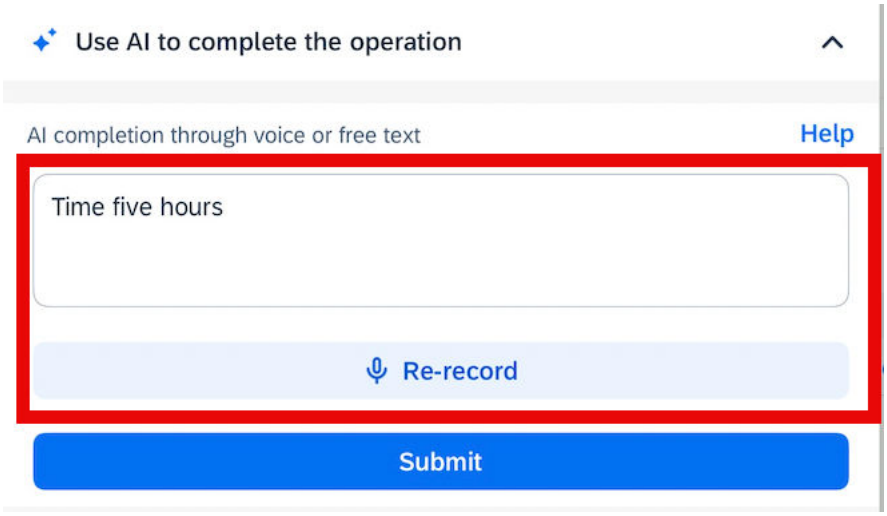
1. On the object's detail screen, set the status to *Complete*.
2. In the task completion window, under *Use AI to complete the Operation*, tap *Start Recording*.



3. Summarize all data required to complete the task, by using your voice.

> **Note**
>
> For examples and recommendations on how to use the feature efficiently, see AI Samples [page 81], as well as you can tap *Help* in the task completion window.

4. Tap *Stop Recording*.
5. You can *Re-record* your voice, or edit the generated text manually.



> **Note**
>
> Tapping *Re-record* will overwrite all the recorded text.

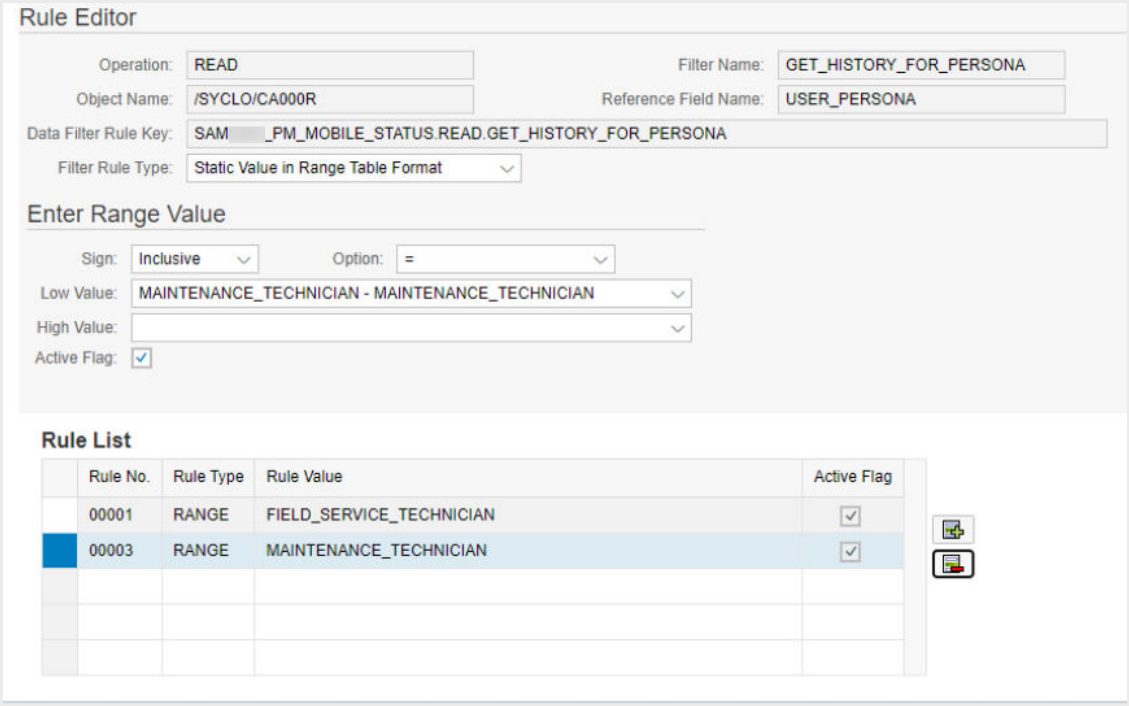
6. Tap *Submit* to populate the data you have entered, into the corresponding fields of the form.
7. If needed, you can modify any fields manually or using your voice.
8. You can add your signature [page 71] if the feature is enabled.
9. Tap *Done* to complete the task.

Example: AI Samples

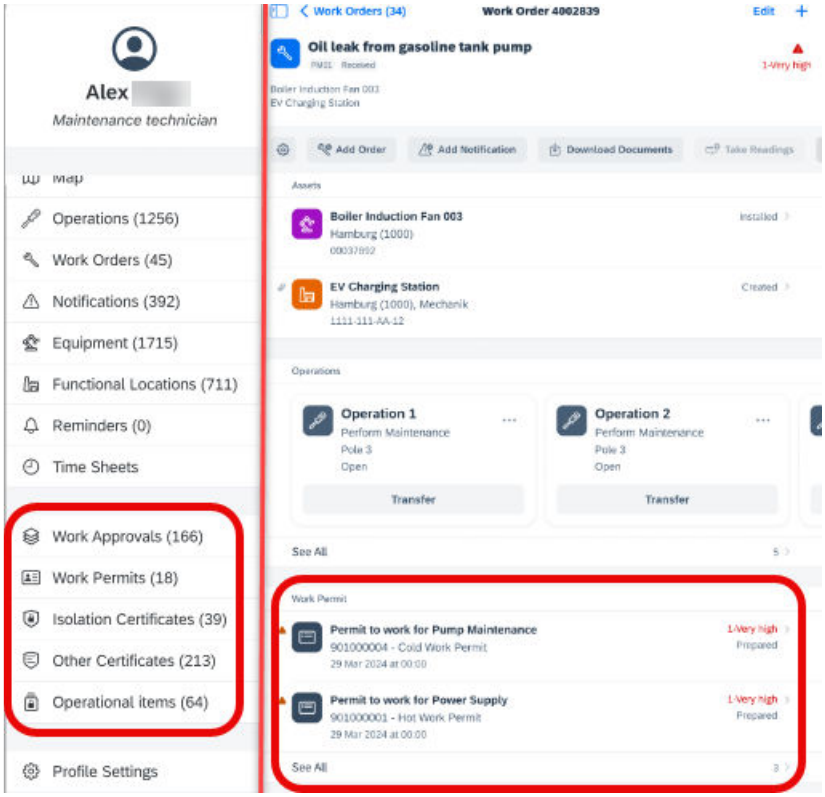
- **Milage, Expense, Time**: *Performed maintenance on this unit on March 18, 2025, for 3 hours. Traveled 12 miles and incurred $275 in expenses for replacement components.*
- **Update Notification**:
  - *The control panel is unresponsive during the system check, likely due to an electrical failure caused by moisture in the wiring connectors. Add additional reminder that pump needs monthly inspection.*
  - *Gas leak detected at the pipeline junction, likely due to prolonged exposure to moisture and high-pressure fluctuations, leading to corrosion and weld deterioration.*
  - *Valve 7 is failing to fully close, causing pressure instability, likely resulting from internal seal degradation due to continuous wear and contamination buildup.*
  - *Unusual vibration detected in the compressor unit, which appears to be caused by misalignment and prolonged operation under high load conditions, leading to excessive bearing wear.*
  - *Pipeline insulation is damaged, exposing metal to external conditions, likely due to prolonged UV exposure and physical wear from environmental factors*
- **Milage, Expense, Note**: *Traveled 37 miles to the food processing plant to service the chiller unit. Cleaned the coils and replaced the air filter—total expenses amounted to $75.00, including $15.00 for cleaning supplies. Drove 2.5 miles to acquire the cleaning supplies. Add a note that to do maintenance every three months to prevent future issues.*
- **Expenses**: *Inspected conveyor belt motor, found worn-out bearings, replaced them with new ones for $78.99, and applied fresh grease for $14.50. Tested succesfully.*

4 Working with Safety Technician Objects

As a Maintenance Technician (Pro) persona, you can also access and work with objects related to the Safety Technician persona.

> **Note**
>
> - Safety Technician objects are available **only** to Maintenance Technicians, who are **not** Safety Technicians in parallel.
> - For the Maintenance Technician (Pro) persona, this feature is only available from 2410 version.
> - If the user uses Safety Technician (WCM) features via the Maintenance Technician (Pro) persona, you need to add the persona to the data filter *SAMXXXX_PM_MOBILE_STATUS* > *GET_HISTORY_FOR_PERSONA*:
>
> 
>

If enabled, you will see all the Safety Technician objects in the Sidebar Menu, as well as on the related Work Order details pages.



Available Safety Technician objects

You can access the following objects as well as edit them via their details pages:

- **Work Permits**:
  - After the Safety Technician has done his safety work by implementing and maintaining lockout and tagout procedures, the work permit can be released and the Maintenance Technician can do the work assigned to him.
  - For more information, see Work Permit Detail Screen.
- **Operational Items**:
  - To ensure that safety measures for work are performed at the operation level, Safety Technicians must perform isolation procedures for an operational item. The operational item is used to describe the operational processing of lockout and tagout procedures. This process consists of orderly tagging and subsequent untagging of technical objects, so that work and tests on technical objects can be performed safely.
  - For more information, see Operational Item Detail Screen.
- **Isolation Certificates**:
  - The Isolation Certificate is used to describe lockout and tagout procedures when controlling the physical blocking and tagging of affected technical objects. It contains the technical asset objects that are to be switched or controlled in the application and provides a detailed description of how the system is to be isolated.
  - For more information, see Isolation Certificate Detail Screen.

- **Other Certificates**:
  - Other Certificates are similar to Isolation Cerificates; however, there is no action that can be done with Other Certificates, they are only to be displayed to check the status of the technical asset objects, and they can be attached to the work permits.
  - For more information, see Certificate Detail Screen.
- **Safety Technician business layers on the Map**:
  - You can see Safety Technician persona-related business objects on the Map, as well as business layers options in the Map Settings.
  - For more information, see Maps Overview and Settings Options.

5 Working with Equipment

5.1 Equipment Overview

Equipment are individual, physical objects that are maintained independently.

You can manage all types of objects as equipment. For example, an equipment can be test equipment, production resources, tools, or computers. Each equipment, or asset, has an individual maintenance history associated with it that you can contribute to and then sync your contributions to the back end.

Equipment are used in maintenance orders, maintenance requests, and functional locations.

You can add work orders, notifications, equipment, notes, attachments, and readings to equipment. See the following topics for more information:

Access your equipment list from the *Overview* screen by tapping the *Technical Objects* section in the KPI section of the app. Or, by one of the additional ways. See Technical Objects Detail Screen [page 87] for more information.

You can perform the following actions on existing equipment in SAP Service and Asset Manager:

- Add work orders to a functional location. See Adding a Local Work Order [page 53].
- Add maintenance requets to existing equipment. See Adding a Notification [page 107]
- Add documents to a current equipment. See Working with Attachments [page 32]
- Add or dismantle equipment to a current functional location. See the following topics:
  - Installing Equipment [page 95]
  - Dismantling Equipment [page 96]
- Take readings of measuring points associated with equipment. See the Measuring Points and Readings Overview [page 97] topic and subtopics.
- View and complete checklists, if any are associated with the functional location. See the Checklists [page 90] topic for more information.
- View related maintenance orders, maintenance requests, equipment, classifications, hierarchy, warranties, and business parters associated with the equipment
- View linear asset data associated with the functional location. See the Linear Asset Management (LAM) Overview [page 123] topic and subtopics for more information.
- View notes, if any are associated with the functional location.
- View an equipment using hierarchy. See the Hierarchy Control Overview for more information.
- Use the FOW add-on component, if needed. If you are using it, the equipment is also used in stops on routes.

> **Note**
>
> - You can edit local *Equipments*, as well as already existing ones.
> - As of 2410, you, as a Field Service Technician Persona Pro, can create new equipment based on previously created equipment.

- Adding a Local Work Order [page 53]
- Adding a Notification [page 107]
- Installing Equipment [page 95]
- Working with Notes [page 35]
- Working with Attachments [page 32]
- Taking a Single Measuring Point Reading [page 100]

5.1.1 Asset Central Overview

Asset Central links production systems and assets with manufacturing and maintenance business processes to reduce operational and maintenance costs and increase asset uptime.

Asset Central communicates with the Asset Intelligence Network back end. The Asset Intelligence Network is an SAP S/4HANA system.

The Asset Intelligence Network collects and tracks equipment information in a central repository. It facilitates collaborative asset management and lets you take full advantage of the Internet of Things (IoT). Organizations manage thousands of assets to keep their plants operational, which include machinery equipment. Timely maintenance is required to ensure that the equipment is working at an optimum level. Maintenance can be difficult due to heterogenous systems, missing information, or other challenges. Asset Intelligence Network can help to solve these issues.

Imagine you have three manufacturers: Manufacturer C providing a motor, and Manufacturer B providing a sensor to a larger manufacturer producing and manufacturing compressors. Once they ship those parts to Manufacturer A, they extract the data (component specifications, alerts, or indicators) from their back-end systems and send it to Manufacturer A, in a digital format. Manufacturer A, in turn, usually has a whole department receiving the data and putting it into their back-end systems, where they store all the data of their assets and the supplied parts and components from other manufacturers. Once the compressor is manufactured, it is then shipped to the operator, along with the extracted data.

The operator has a back-end system as well, and one of those back-end systems may be a maintenance system to maintain the asset. To perform the maintenance activities, the operator usually needs data from the supplier, like data on how to maintain the asset, specifications, or alerts and indicators.

So here, in our example, the compressor, or what we call the digital twin of the compressor, resides in Asset Intelligence Network, as well as all the components of that compressor. The advantage of this is that the sub suppliers: Manufacturer C and Manufacturer B, can provide that information directly to Asset Intelligence Network. Manufacturer A only needs to provide information about that bigger asset, the compressor. The data to the two components (the sensor and the motor, or engine) is still available from Manufacturer C and Manufacturer B. And, they only need to integrate to one system.

On the side of the operator they can now connect their back-end system to only one platform. Before Asset Intelligence Network, it was hardly possible, because every manufacturer or supplier had their own manufacturer portal. Connecting to multiple manufacturer portals is not efficient. Now operating companies can connect their back-end systems to Asset Intelligence Network and fetch the data directly to their systems to get an insight into the data of an asset.

For more information on Asset Central functionality in SAP Service and Asset Manager, see the following topics:

- PdMS Indicators [page 89]
- Checklists [page 90]

5.2 Technical Objects Detail Screen

The *Technical Objects* screen shows a list of the *Functional Location* and *Equipment* objects. Tapping on an object takes you to the detail screen for the object.

Accessing the Technical Object Functional Location or Equipment

You can access an individual equipment or a functional location detail screen by multiple ways:

- Tap the *Technical Objects* section on the *Overview* screen in the KPI section of the SAP Service and Asset Manager application. Here, you can see the number of the technical objects. The *Technical Objects* detail screen displays. Select your desired equipment or functional location from the list to display its detail screen.
- Tap the hamburger menu icon on the top left of the screen to open the *Side* navigation menu. Tap *Technical Objects* to open the list of all equipment and functional location objects.
- Tap the *TechnicI Objects* section on the *Maintenance Order*, *Maintenance Request* or *Operation* detail screen to bring up the equipment or functional location detail view.

General Overview

The *Equipment* or *Functional Location* detail screen gives you a brief description of an equipment or functional location, their location, and recent histories. The technical object header lets you know the object name and ID. You can search your technical object based on the object name or ID.

The equipment *Location* is underneath the equipment header. Depending on the equipment site, the location could be a factory, a building campus, or in a city. If your site has maps enabled, you can use the maps functionality and GPS to help you locate the equipment site.

The *Equipment Details* or *Functional Location Details* section gives you details about the specific piece of technical object you selected, such as the plant location, work center, model number, inventory number, room location, or other details that your customer site determines are important for display on your device.

If the technical object has measurement points, a *Measurement Points* section is displayed. Here, you can see graphs of the measurement point readings, if available. Tap on the measurement points section to access the measurement points and to take readings of the points. Information on measurement points and readings is found further in this section, starting with the Measuring Points and Readings Overview [page 97] topic.

If additional subequipment are installed under the main equipment object, that equipment is listed in the *Equipment* section. The name of the equipment and details of the equipment are shown, and its installation status. Tap on any equipment row to view details of the equipment and to dismantle the equipment. See Dismantling Equipment [page 96] for more information.

If attachments are associated with the technical object, they are listed in the *Documents* section. Note that by default only limited information regarding the attachments are fetched to the client. The attached content is downloaded to your device at your request through a push process. See the Working with Attachments [page 32] topic for more information.

Underneath the *Documents* section, there can be sections for *Hierarchy*, *Related Maintenance Orders*, *Related Maintenance Requests*, *Warranties*, *Classifications* and *Business Partners*, *Error Codes*, *Bill of Materials*, *Linear Data*, *NotesChecklists*. A number to the right of the section name lets you know how many objects are associated with that section. For example, if two warranties are associated with the technical object you selected, you see a *2* to the right of the *Warranties* field. Tap on any section to see that detail screen.

Tap the *Edit* menu item to edit the technical object displayed on the *Equipment* or *Functional Location* detail screen. To learn how to edit any object in the SAP Service and Asset Manager application, including equipment, see the Editing an Object [page 30] topic.

Tap the *Take Readings* menu item to take any readings on the measuring points associated with the equipment. See the Taking a Single Measuring Point Reading [page 100] topic for more information on how to take a reading.

Related Information

Functional Location Overview [page 133]
Equipment Overview [page 85]

5.2.1 Warranties

A warranty is a specific guarantee to vouch for defects or faults in the asset purchased or used, valid for a specific amount of time. The type and scope of the services covered, such as repairing a defect for free or taking the product back are defined in the warranty.

Tap on the main *Equipment* screen to access the *Warranties* detail screen. Two types of warranties are available in SAP Service and Asset Manager; a customer warranty, and a supplier, or manufacturer warranty. Both types of warranties include the warranty ID number, the start date, and the end date of the warranty.

Tap on an individual warranty to access additional details for the warranty.

> ⓘ Note
>
> Warranties are read only.

5.2.2 Business Partners

Service orders, functional locations, and equipment can be linked to a business partner. Business partners are parties in which your company has a business interest. A business partner can be a customer, a prospect, a supplier, a competitor, or even an employee of your own company.

> **Note**
>
> The information is read-only.

5.2.3 Classifications

When you are managing a large number of objects, you can group these objects according to particular and logical features. The hierarchical structure of classifications enables you to find specific objects starting from one top object, moving to multiple, lower level objects.

A classification hierarchy could look like the following example:

Pumps > *Rotary Pumps* > *Magnetically Coupled Pumps*

The classifications listed in the *Classification* section for each equipment and functional location let you know how functional location or each piece of equipment is categorized in the back end. Tap on any classification to view its characteristics, or the details of that classification.

You can edit classification characteristics. Tap on any classification characteristic line item to access its *Edit Characteristic* screen. Change the characteristic value to the new desired value and tap *Done*. If you did not want to edit the characteristic, tap *Cancel* to exit out of the edit screen.

5.2.4 PdMS Indicators

PdMS, or Predictive Maintenance and Service equipment indicators allow you to easily identify the health status of your equipment. PdMS is part of the Asset Central component, which relays information to and from the SAP Asset Intelligence Network back end.

For more information on how the PdMS predicts maintenance events subsequently predict business processes for operational excellence (planning, procurement, scheduling, execution), which lowers risk and improves asset availability, see the Asset Central Overview [page 86] topic.

> **Note**
>
> If you do not see the *Indicators* section on your *Equipment* detail screen for any equipment, then the Asset Central solution is not installed on your mobile device. Talk to your administrator if you believe you should have access to this solution.

Alerts, or indicators, are calculated from sensor data or health scores to give you information about the issues your equipment or a component on the equipment is experiencing. On the basis of the alerts, you can work to resolve the issues in question.

To view indicators, from the main *Overview* screen, tap on *Equipment*, then tap on the *Indicators* section. Note that not every equipment may have indicators. If an equipment does not have indicators, the *Indicators* section is not present.

The main *Indicators* screen displays. Here, you can view all of the indicators associated with the selected equipment. Indicators can measure various things: temperature, BPM, run hours, or a general health score, for example. Each equipment can have different indicators, and a different number of indicators. Each indicator

can be set to automatically monitor and update to SAP Service and Asset Manager at different intervals. And, each indicator can have different thresholds and values for you to monitor. Your site administrator will let you know which values are critical for your site.

Tap on any indicator row to view the detail screen for the individual indicator. Details for the indicator depend on the type of indicator, but generally include the indicator name, value, type of equipment, and indicator trend (whether the indicator has been trending up or down historically).

The main *Indicators* screen and all indicator detail screens are read-only.

While you cannot currently add work orders, service orders, or notifications through the individual *Indicator* detail screen, if action is needed due to an indicator setting, see the following topics:

- Adding a Local Work Order [page 53]
- Adding a Notification [page 107]

5.2.5 Checklists

Checklists are lists of items that require inspection by you. Answers to questions on a checklist can be a simple yes or no, or a measurement reading, which then updates indicators.

The ASPM or Asset Strategy and Performance Management checklist, or questionnaire, gives you the ability to fill out safety checklists before you complete a work order. The answers you give on each checklist assigned to an equipment helps to identify functionality failures, failure modes, and effects. The checklist feature is included in the Asset Central component, which must communicate to the Asset Intelligence Network, to the Reliability-Centered Maintenance (RCM) app specifically, to function.

Use checklists to perform regular inspections on your equipment, including updating attributes and indicators. Checklists are used for maintenance purposes and to record inspection results. Checklists are also used when you are buying a new piece of equipment from a manufacturer. The manufacturer can prepare checklists on their equipment functionality.

Opening a Checklist

Your reliability engineer, or administrator, on the back end, will assign specific equipment-specific checklists on set cycles based on equipment factors like alarm settings or maintenance schedules.

1. Tap on a piece of equipment from the main *Equipment* screen.
   The *Equipment Detail* screen displays.
2. Tap the *Checklist* section.
   The *Checklists* detail screen displays, displaying a list of available checklists for that equipment. Each checklist shows a status of *Open*, *In Progress*, or *Completed*.

   > **Note**
   >
   > You must complete all checklists associated with an equipment that is part of your work order before you can set your work order to Completed.
3. Select a checklist in your list that is in an *Open* or *In Progress* state. An *Open* state means that you have not started work on the checklist yet. *In Progress* means that you have started work on the checklist, but all

questions have not been answered. *Completed* means that all questions have been answered. To open the checklist, tap on it.
The checklist opens.

4. A checklist can have one or more screens of questions. Answer the questions on each screen. Tap *Next* to move to the next screen. When complete, tap *Save* to save your checklist.

> **Note**
>
> You can write notes in the *Notes* section, if available, for each question. Adding text in the `<Notes>` field is optional.

Your checklist for the equipment is complete. You can now complete the work order for the equipment, as long as no other checklists are open or in progress for that equipment.

Adding a Checklist

You can add a checklist that was not originally on your assigned checklist screen for your equipment, as long as a template for that checklist exists on the back end. For example, if an indicator on a piece of equipment reaches a set threshold, it can trigger the release of a template for you to access on your device. Fill out the template to alert your team of possible equipment issues and to improve equipment performance.

1. Tap on a piece of equipment from the main *Equipment* screen.
   The *Equipment Detail* screen displays.
2. Tap the *Checklist* section.
   The *Checklists* detail screen displays, displaying a list of available checklists for that equipment. Each checklist shows a status of *Open*, *In Progress*, or *Completed*.

> **Note**
>
> You must complete all checklists associated with an equipment that is part of your work order before you can set your work order to Completed.

3. Tap the *Action* menu (+) and select *Add Checklist*.
   The *Add Checklist* window displays.
4. Choose your `<Category>` and `<Template>` from the dropdowns choices provided. When finished, tap *Done*.
   Your new checklist is added to the *Checklists* detail screen. See the *Opening a Checklist* section for information on how to fill out and work with checklists.

Editing Checklists

You can edit a checklist as long as you have not set the work order associated with the checklist to Complete. To open and edit a checklist, tap on it.

5.2.6 Hierarchy Control Overview

When navigating using hierarchical node structures, you can tap on a parent to expand the node and view the children of the parent. You can also navigate up or down from that node location, opening or closing nodes as you go.

Hierarchy control is used to navigate both equipment and functional location lists. The hierarchical control views are used in the following locations and ways:

- Viewing an equipment hierarchy from the Equipment detail screen
- Viewing a functional location hierarchy from the Functional Location detail screen
- Viewing a functional location hierarchy from within a work order
- Viewing a functional location hierarchy from a notification
- Viewing an equipment hierarchy from the main Map view
- Viewing an equipment hierarchy from a notification
- Viewing an equipment hierarchy from an operation or a suboperation
- Viewing an equipment hierarchy from within a work order
- Viewing a bill of materials (BOMs) hierarchy from an equipment or functional location
- Viewing an assembly hierarchy from the Work Order detail screen

Viewing Lists Using Hierarchy

1. Tap on your selected object (equipment, functional location, or BOM) from the main object screen.
   The *Detail* screen for the selected object displays.
2. Tap the *Hierarchy* section for your selected object.
   The *Hierarchy* screen displays the selected object as the parent object, the child object of the parent object, and any children objects of the child object up to three levels deep in three columns. If the selected object is not the root oject, its parent object(s) display in the left overflow column.
3. Navigate through the hierarchy by tapping on any parent or child object. Tapping on an object displays the detail screen of the object.

Selecting Items Using Hierarchy

When you use the add wizard to add either an equipment object or a functional location object that is part of a hierarchy, with a parent object and children objects, you use hierarchy to select the desired object.

1. Tap on the + icon from the main object screen (either *Equipment*, *Functional Location*, or *Bill or Materials*) and select *Installation*.
   The *Install <Object>* window appears.
2. When you tap on an object to install that is part of a parent-child hierarchy, you'll see a small icon to the right of the object, indicating a hierarchy and the ability to select children objects under the parent. Under the icon is a numeral, indicating how many children are under the parent object.

> **Note**
>
> If you're using an Android device to work with the app, the small icon to the right of the object does not immediately appear. The icon displays after you tap on a parent row.

3. To navigate back and forth between a parent and its children objects, tap the appropriate hierarchy control icon.

5.2.7 Bill of Materials

A bill of material, or BOM, is a formally structured list of the components that make up a product or assembly.

A BOM list contains the object number of each component, together with the quantity and unit of measure. BOMs are used in different forms for various situations where a finished product is assembled from several component parts or materials. Depending on the industry sector, BOMs can also be called recipes, or lists of ingredients.

For information on how to use hierarchy control in a *Bill of Materials* detail screen, see the Hierarchy Control Overview topic.

You can add a part to a work order from a specific part you select from the *Bill of Materials* detail screen. Once you tap to the individual part screen, tap the + icon and select *Add Part*. For detailed information about adding a part, see the Adding a Part [page 66]

5.3 Creating Equipment From a Template

You can create new equipment.

Context

Use the following procedure to create new equipment from a template.

Procedure

1. Tap on the main *Equipment* screen.

   The *Equipment Detail* screen displays.
2. Tap the + icon.

   The *Add Equipment* screen displays.
3. Tap on *Create From* and select *Template*.

> **Note**
>
> You can only see the templates if you created a local equipment.

4. Tap on *Category* and select *Machines*.
5. Tap on *Template* and select the ID of template that you want to use.

> **Note**
>
> This list contains all templates that exist in the backend.

6. Fill the *Description* field.
7. Select the desired *Maintenance Plant*.
8. Tap and select *Functional Location*, *Superior Equipment*, *Plant Location*, and *Room*.

> **Note**
>
> The items in superior equipment list picker are displayed in hierarchical order. If you select superior equipment, functional location is disabled, and superior equipment is disabled if you select functional location.

9. Add details in the *Note* and *Attachment Description* fields.
10. Tap on *Add* in the *Attached Files* field to attach a photo, take a photo and add it as an attachment, or select a file.
11. Tap on the barcode icon on the right of the *Model Number* and the *Serial Number* fields to scan the barcode respectively.
12. Tap on *Include from Reference Equipment* and select what data you would like to copy from the template.

> **Note**
>
> This field only displays if you selected *Template* in the *Create From* field, and you selected a template in the *Template* field that you want to use.

13. Tap on *Save* to save your changes.

5.4 Creating Equipment from Previously Created Equipment

Context

Use the following procedure to create new equipment from previously created equipment.

Procedure

1. Tap on the main *Equipment* screen.

   The *Equipment Detail* screen displays.
2. The the + icon.

   The *Add Equipment* screen displays.
3. Tap on *Create From* and select *Previously Created*.
4. Tap on *Equipment* and select the previously created equipment.

   The *ID*, *Location*, and *Superior Equipment* fields are automatically filled from the previous equipment, but you can modify the *Location* and *Superior Equipment* fields.
5. Tap on *Save* to save your changes.

5.5 Installing Equipment

If a parent, or superior, equipment exists, you can install a child equipment to that parent.

Context

Use the following procedure to install a child equipment onto an existing parent equipment or functional location. You can only install equipment under already existing (parent), equipment or functional locations. If there is no equipment installed on the equipment or functional location you selected, the *Action* menu does not list the *Installation* or *Dismantle* options.

Procedure

1. Tap on a piece of equipment from the main *Equipment* screen.

   The *Equipment Detail* screen displays.
2. Tap the + icon and select *Installation* from the menu choices.

   The *Install Equipment* screen displays, with many fields automatically filled out from the parent, or superior, equipment.
3. Tap the `<Equipment>` field. When the *Select Equipment* window displays, choose the equipment to install. When finished, tap *Done*.

   A message appears to say that the equipment is installed.
4. Tap *OK* to take a meter reading or *Skip* to skip the meter reading and install the meter without reading it. To learn how to take meter readings, see the topic and subtopics in Measuring Points and Readings Overview [page 97].

Next Steps

You can now take a reading for the newly installed equipment. Tap the + icon and select *Take Reading* from the menu choices.

To save your changes, be sure to perform a sync with the back end.

5.6 Dismantling Equipment

Context

Use the following procedure to dismantle, or uninstall, a child equipment from an existing parent equipment or functional location. Once the equipment is dismantled, it is then available to install under other parent equipment if desired.

You can only dismantle or install equipment under already existing (parent), equipment or functional locations. If there is no equipment installed on the equipment or functional location you selected, the *Action* menu does not list the *Installation* or *Dismantle* options.

Procedure

1. Tap on a piece of equipment from the main *Equipment* screen.

   The *Equipment Detail* screen displays.
2. Tap the + icon and select *Dismantle* from the menu choices.

   The *Dismantle Equipment* screen displays, with the parent, or superior, equipment listed.
3. Tap the `<Equipment>` field. When the *Select Equipment* window displays, choose the equipment to dismantle. When finished, tap *Done*.

   A message appears to say that the equipment is dismantled.

Next Steps

You can now install the equipment to other parent equipment or FLOCs. See Installing Equipment [page 95] for more information. To save your changes, be sure to perform a sync with the back end.

5.7 Measuring Points and Readings Overview

Measuring points are associated with meters and sensors. Meters and sensors are always associated with assets attached to a maintenance order or request.

Measuring points describe the physical or logical locations at which a condition is described. For example, the coolant temperature in a nuclear power station after the coolant has left the pressure vessel, or the number of revolutions of a rotor shaft of a wind driven power plant. Measuring points are located on assets in SAP Asset Manager.

General Information

> **Note**
>
> Similar to Recording Characteristics Results on an Inspection Checklist [page 73], you can take Measuring Point Readings in both **Table View** and **List View**. For more information, see:
>
> - Recording Results in Table View [page 74] as a reference procedure using Editable Data Table, applicable for Measurement Readings as well.
> - Working with Editable Data Tables [page 37]
> - Personalization Settings [page 24] - see how to switch between **Table View** and **List View**.
> - Taking All Measuring Point Readings [page 99] and Taking a Single Measuring Point Reading [page 100].

You take measurement readings at measurement points in particular measurement units at particular intervals. For example, the temperature in degrees Celsius of the coolant in the coolant pipe that leaves the pressure vessel at the nuclear power station. Or, the number of revolutions per minute of the rotor shaft of the wind driven power plant.

Depending on the type of asset and the type of measuring point, enter the measuring point reading in one of three different forms:

Valuation	Use	Example
Quantitative	Enter the current reading measure into the application on your mobile device. The unit of measurement (degrees Celsius in the example) is defined by the characteristic of the leading record of the measuring point.	February 2, 2020, 12:00 25°C

Valuation	Use	Example
Qualitative	Rather than a numerical type of reading, a qualitative reading is a descriptive reading for a measuring point. **Note** You can only enter qualitative readings if your system was set up specifically for the measuring points concerned to accept qualitative readings.	February 2, 2020, 12:00 Temperature is normal
Combination of quantitative and qualitative	Enter the current measuring point reading in the system along with a valuation code	February 2, 2020, 12:00 25 degrees Celsius Temperature is normal

Measuring Point Ranges

A measurement point range represents the values that a measuring instrument or counter can display. For example, thermometers can measure temperatures in a measurement range between -20 degrees Celsius and +45 degrees Celsius. Another example is that a tape measure can measure lengths in a measurement range 0–10 meters.

Filtering Measuring Points

See the topic Filtering Objects [page 27] for information on how to use filters in the application.

You can filter measuring points in the following additional ways:

- Type: continuous, counter, or val code
- Last Read
- Point ID
- Skipped
- Empty

5.7.1 Working with Analytics

SAP Service and Asset Manager supports the following charts as analytical measuring tools:

- Bar charts: Compares similar groups of data

- Line charts: Shows trends or changes in data over time

If a line chart or a bar chart is not available for the measuring point, SAP Service and Asset Manager can also use the last valuation code as a thumbnail.

When a technical object, equipment or functional location, contains a single measuring point or multiple points, the *Equipment* or *Functional Location* screen displays a thumbnail chart for each point. Tap on an individual thumbnail chart to access the larger, detailed, chart, and more details about the measuring point.

To take a measurement point reading, tap *Take Reading* at the bottom of any of the chart detail screens. For more information on taking a reading, see:

- Taking All Measuring Point Readings [page 99]
- Taking a Single Measuring Point Reading [page 100]

To view an *All Data* screen for a chart, tap on the *Details* section of the individual chart detail screen. The *All Data* screen is a running list of all of the readings taken for the measuring point. Tap on an individual reading to view a *Reading* screen with more details for selected reading.

5.7.2 Taking All Measuring Point Readings

Context

> ⓘ Note
>
> - Similar to Recording Characteristics Results on an Inspection Checklist [page 73], you can take Measuring Point Readings in both **Table View** and **List View**. For more information, see:
>   - Recording Results in Table View [page 74] as a reference procedure using Editable Data Table, applicable for Measurement Readings as well.
>   - Working with Editable Data Tables [page 37]
>   - Personalization Settings [page 24] - see how to switch between **Table View** and **List View**.
> - Not all maintenance orders or maintenance requests include equipment and not all equipment or functional location include measurement points. If your maintenance order or request does not have any equipment listed, or your *Equipment* or *Functional Location* detail screen does not have any measuring points listed, then you do not have to follow this procedure.

Use the single measuring point reading method if you do need detailed information about the measuring point before taking the reading, such as upper and lower limits, and characteristics of the measuring point. If you are not already aware of this information want to review it before taking your reading, follow the single measuring point reading method described in the topic Taking a Single Measuring Point Reading [page 100].

Procedure

1. Tap on the maintenance order or maintenance request within a route that has an equipment or a functional location with a measurement point that requires a reading.

   The maintenance order or request detail screen displays.

2. Tap the menu item *Take Readings* found at the top of the screen.

   The *Take Readings* screen displays.
3. For each reading, add your reading in the `<Value>` field. Add any other reading measurements in other fields (they are different for various measuring points). Optionally, type a note in the `<Note>` field. If you want to skip a specific measuring point, select *Skip*.
4. Tap *Done* to save the new measuring point readings.

   A message displays to let you know your measuring point readings were taken successfully.

Results

In the *Measuring Points* section, the reading charts are updated. If you navigate to each measuring point, the new measuring point reading information appears in the *Current Reading* section. The previous measuring point reading now appears in the *Previous Reading* section. Be sure to *Sync* your mobile client to send the measuring point reading information to the back end.

5.7.3 Taking a Single Measuring Point Reading

Context

> ⓘ Note
>
> - Similar to Recording Characteristics Results on an Inspection Checklist [page 73], you can take Measuring Point Readings in both **Table View** and **List View**. For more information, see:
>   - Recording Results in Table View [page 74] as a reference procedure using Editable Data Table, applicable for Measurement Readings as well.
>   - Working with Editable Data Tables [page 37]
>   - Personalization Settings [page 24] - see how to switch between **Table View** and **List View**.
> - Not all maintenance orders or maintenance requests include equipment and not all equipment or functional location include measurement points. If your maintenance order or request does not have any equipment listed, or your *Equipment* or *Functional Location* detail screen does not have any measuring points listed, then you do not have to follow this procedure.

Use the single measuring point reading method if you need detailed information about the measuring point before taking the reading, such as upper and lower limits, and characteristics of the measuring point. If you are already aware of this information and do not review it before taking your reading, you can use the multiple measuring point reading method described in the topic Taking All Measuring Point Readings [page 99].

Procedure

1. Tap on the maintenance order or maintenance request within a route that has an equipment or a functional location, with a measurement point that requires a reading.

   The maintenance order or request detail screen displays.
2. Tap the specific equipment or functional location with the measuring point to read. Alternatively, you can swipe the object to access the contextual menu. Choose *Take Readings* and proceed to *Step 5* in this procedure.

   The *Equipment* or *Functional Location* detail screen displays.
3. Tap the specific measuring point to read from the *Measuring Points* section of the detail screen. If necessary, tap *See All* to display all measuring points associated with the maintenance order, equipment or functional location.

   The measuring point detail screen displays.
4. Tap *Take Reading*.

   The *Take Reading* screen displays.
5. Add your reading in the `<Reading>` field and tap *Done* when finished. Optionally, type a note in the `<Note>` field.
6. Tap *Done* to save your new measurement point reading.

   A message displays to let you know your measurement point reading was taken successfully.

Results

In the *Current Reading* section, the new measurement point reading information appears. The previous measurement point reading now appears in the *Previous Reading* section. Be sure to *Sync* your mobile client to send the measurement point reading information to the back end.

6 Working with Notifications

6.1 Notifications Overview

Notifications are used to document maintenance tasks completely. You can use them for preliminary planning and execution of future maintenance orders.

Use Notifications to process maintenance orders and requests if objects or equipment malfunction while you're working on a maintenance order. You can also use Notifications to document maintenance work on an object or equipment that you've performed while on a maintenance order.

If a notification has a designator of *QM*, it's a Quality Management (QM) notification. Working with QM notifications works in much the same way as working with regular notifications. For specific QM procedures, see the *Working with Quality Management* chapter in this user guide.

6.1.1 Notifications Detail Screen

> **Note**
>
> Depending on which layout you choose in Personalization Settings [page 24], the Notification details screen will be displayed in *New* or *Classic* views.

The **Notification** detail screen displays a list of the requests and gives you a brief description of the request. After you tap on a Notification listing, you're taken to the **Notification** detail screen for the specific Notification.

The header lets you know the object's status, priority, and due date. The Notification detail screen also has the date and time of the malfunction, breakdown information, if any, and a detection method to assist you in diagnosing the issue.

The *Location* is displayed underneath the notification header. Depending on your site, the location could be a factory, a building campus, or in a city. If your site has maps enabled, you can use the maps functionality and GPS to help you locate your site.

The *Functional Location* section also displays equipment, but in this case, the equipment is tied to a specific place where you perform a maintenance-based task. Tap on the equipment in the Functional Location section to view the Functional Location detail screen and to perform maintenance duties on the equipment. For more information, see the Functional Location Overview [page 133] topic.

The *Notification Items* section displays items associated with the notification. Items identify a problem, damage, or activity in greater detail than the original notification has described.

The *Notification Tasks* section shows you the tasks, or work, that is planned for you to accomplish while completing the notification.

If there are any activities, they are listed in the *Notification Activities* section. Activities are service or maintenance actions performed that are not the result of malfunction or damage.

The *Work Order* section lists any current related work orders associated with the notification. To learn more about work orders, see the *Working with Work Orders* chapter. See the Adding a Work Order [page 112] for more information on how to add a work order to a notification.

The *Maintenance Request Items* section displays items associated with the request. Items identify a problem, damage, or activity in greater detail than the original request has described.

You can add the following to a maintenance request item by tapping the + icon at the top of the screen and selecting the appropriate menu item:

- Add Cause:
- Add Task:
- Add Activity:
- Add Note:

If there is any equipment associated with your request, they are listed in the *Technical Objects* section underneath the maintenance request items. To see all of the equipment details for the equipment, tap on an equipment, or asset. Equipment details vary depending on the asset, but can include measuring points, the history of the asset, and any documents associated with the equipment.

The *Order* section displays any order attached to the maintenance request. Tap on an order to view details.

Underneath these main sections, there are sections for *Documents*, *Notes*, and *Related Maintenance Orders*. A number to the right of the section name lets you know how many objects are associated with that section, if any. For example, if two notes are associated with the job you tapped, you see a *2* to the right of the *Notes* field. Tap on any section to see that detail screen.

Tap the + icon at the top of the screen and select the appropriate menu item to add the following:

- Add Item: See Adding an Item [page 111]
- Add Note: See Working with Notes [page 35]

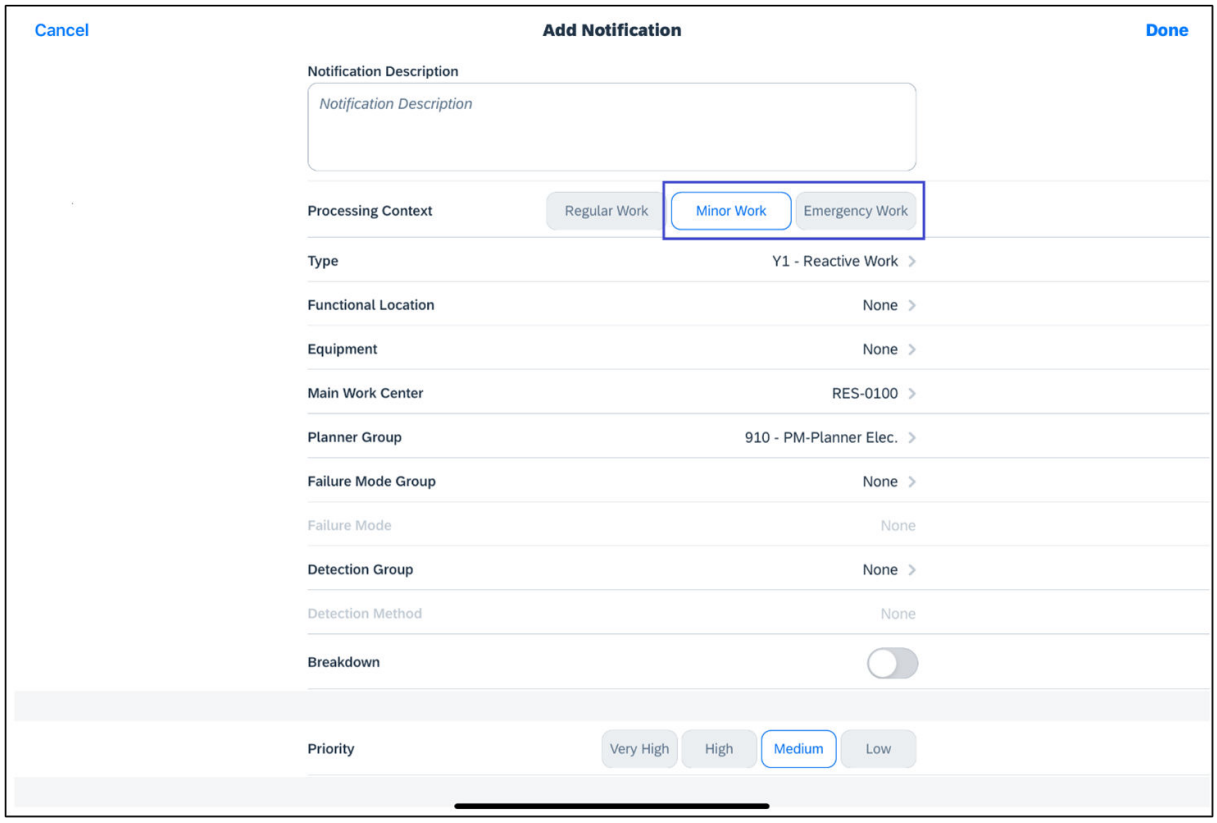
Filtering and Searching Maintenance Requests

See the following topics for information about using the filtering and search options in general:

- Filtering Objects [page 27]
- Searching for Objects [page 27]

6.1.1.1 Emergency and Minor Work Notifications

If the technician is authorized, the *Add Notification* screen will have the *Minor Work* and *Emergency Work* options available for selection. When you select this option and submit the request, the request is not sent to the screening technician for approval, but is automatically approved and enters the planning phase.



Minor Work Notification processing

- Once created, a local notification will be in the *Started* status. To complete it, use the *Complete Notification* button.
- When synchronizing with the back end, after a notification is created, it is downloaded to the device with the number and is in the *Started* status. To complete it, use the *Complete Notification* button.

> **Note**
>
> The user must have an *I_EXCP_MN* (*Exception Process* > *Maintenance Notification*) object to be able to create a minor work notification with an exception process.

Emergency Work Notification processing

- Once created, a local notification will be in the *Accepted* status.
- The emergency notification must be synchronized with the back end to create an associated work order.
- When synchronizing with the back end, after the notification is created, it is in the *Approval: OK* status. A work order is created for this emergency work notification. The work order skips the planning phase and enters the *Ready* phase.
- When delta synchronization is complete, the notification and work order will be downloaded to the device. The notification will contain:

a. Mobile Status = *Accepted*

b. Last System Status = *Order assigned*

c. Complete System Status = *Notification in process*, *Order Assigned*, *Approval: OK*

- The downloaded work order will be available on the *Notification* detail screen. The work order will contain:

a. Mobile Status = *Ready*

b. Extended System Status ~= *Exception Process*, *Released*, *Object List* generated

c. The due dates of the orders match notification deadlines

d. An operation with the text is similar to the notification text. The operation will be in the *Ready* status and will have *Clock-in* or *Start* options available.

> **Note**
>
> The user must have the *I_EXCP_MN* (*Exception Process* > *Maintenance Notification*) and *I_EXCP_MO* (*Exception Process* > *Maintenance Order*) objects to be able to create an emergency work notification and related work order with an exception process.
>
> The exception process feature is available in S/42022 onwards, that is, in S4CORE 107 and later, as part of core EAM.

6.1.2 Making Status Changes to Notification Objects

When working with notifications, you make status changes to both the notification itself and the individual tasks within the notification.

To effectively work with a notification and to track your individual tasks within that notification,

SAP Service and Asset Manager allows you to make status changes to both the entire notification as well as to individual tasks within that notification. That way, you know when you have started on a notification within your list but not yet started on any of the individual tasks, for example. Or, that you have started on the notification and have successfully completed two out of five of the tasks in the notification. Using the status changes is an easy way to track where you are with every notification and every task on your list.

> **Note**
>
> You cannot reverse a status. Be sure that when you tap through to the next status change, the previous status is completed. For example, if you are not yet ready to start a notification, do not tap on *Started* if a notification is in the *Received* state. Only start a notification when you are ready to begin working on that notification.

Changing the Status of a Notification

You can change the status of a notification from *Received* to one of the following:

- Start
- Complete (must move to Start first)

From the main Notification list screen, tap on a notification to access the details screen for the notification. At the bottom of the screen, notice the notification status. Here, tap to change the status. At times, you may have

to change the status of task items before you can continue to change the status of the entire notification. For instance, you must complete all tasks before tapping on *End Notification*.

When you have changed a status but not yet synced to the back end, the <Sync> icon is always present. When you have marked a notification as complete, the ability to change the status to any other status at the bottom disappears as well as the ability to edit the notification in any way.

When the Breakdown Box Is Checked

To complete a notification that has the *Breakdown* box checked, you are prompted to enter an end date into the <Malfunction End Date> field and an end time into the <Malfunction End Time> field using the *Edit Notification* screen. A modified *Edit* screen pops up when a notification with a breakdown is completed. This also applies to completing work orders with an associated notification with a breakdown. When a notification is modified, only that notification is refreshed without re-loading the whole data in the map.

Changing the Status of a Task

To change a task status, perform the same steps as you would when changing the status of the main notification. From the individual notification details screen, tap on a single task. The task details screen displays. At the bottom of the screen, notice the notification status. You can change a task status to the following, from the following order:

- Received
- Start Task
- End Task
- Task Success. This is a configurable state, so it may or may not be present depending on who set the system up.

Note that you can end a notification after all tasks are completed successfully.

6.1.3 Related Notifications

The related maintenance requests and pending requests detail screen associated with an equipment or functional location shows you which requests are relevant to that technical object, both currently and in the future.

Find the *Related Maintenance Requests* section on the *Equipment* or *Functional Location* detail screen.

Tap the *Related Maintenance Requests* section to access the *Related Maintenance Requests* detail screen. The screen is split into two subscreens:

- **Previous Maintenance Requests:** Past requests assigned to the technical object
- **Pending Maintenance Requests:** Current or future requests assigned to the technical object

Tap on *See All* on either subscreen to view the complete list of requests, if the list extends past the first page of the *Related Maintenance Requests* detail screen. Tap on any request row to view the details of that request. All request details are read only.

6.2 Adding a Notification

Context

You can create a request from the following detail screens in the SAP Service and Asset Manager application:

- Main Map detail screen
- Equipment detail screen
- Functional location detail screen
- You can select an equipment or functional location from the main map and add a request to that equipment or functional location.

Once you add a local request, work with it as you would with a request that is sent to your device from the SAP back end. You can change the status and log time against it. You're allowed to discard a locally created request no matter its status. If sync errors occur, you're allowed to fix them. When you sync to the back end, the request is automatically assigned to you and appears on your device if the work isn't completed and you didn't transfer it to another person.

Procedure

1. Tap on the + or ... icon and select *Add Maintenance Request* from the menu list. You can only add a request to this object in SAP Service and Asset Manager if you see the *Add Maintenance Request* menu item.

   The *Add Maintenance Request* screen displays.
2. Type a short description for the request in the `<Maintenance Request Description>` field. Fill out the `<Maintenance Request Description>` field as it's mandatory.

   > ⓘ Note
   >
   > The `<Maintenance Request Description>` field has a limit of 40 characters.
3. Select a `<Technical Object>` from the list by tapping the arrow to the right of the field.

   You're returned to the *Add Maintenance Request* screen.
4. Select a `<Type>` of request, if the one automatically selected isn't the correct one.
5. Select a `<Failure Mode Group>` from the list by tapping on the arrow to the right of the field, if any.
6. Select a `<Failure Mode>` from the list by tapping on the arrow to the right of the field, if any.
7. Select a `<Detection Group>` from the list by tapping on the arrow to the right of the field, if any.
8. Select a `<Detection Method>` from the list by tapping on the arrow to the right of the field, if any.
9. Select an `<Effect>` from the list by tapping on the arrow to the right of the field.
10. Tap the *Breakdown* toggle switch if the request involves a breakdown.

    Start Date and Start Time can be added to the *Malfunction Start Date* and *Malfunction Start Time* fields by selecting the `<Start Date>` switch. You can manually change either the start date or time by editing the local request. Start Date is optional.

11. Tap a `<Priority>` box if the automatically selected priority isn't the correct one.
12. Add a note in the `<Notes>` field. Use the *Use Template* button, to give the specific information.

To add an optional Attachment to the request, do the following:

13. Type a description in the `<Attachment Description>` field if you're attaching a photo or a file.,
14. Tap the + box to start the attachment process if you're attaching a photo or a file.

To add an optional Item to the request, do the following:

15. Add an `<Item Description>`.
16. Select a `<Part Group>` from the list by tapping on the arrow to the right of the field, if any.
17. Select a `<Part>` from the list by tapping on the arrow to the right of the field, if any.
18. Select a `<Damage Group>` from the list by tapping on the arrow to the right of the field, if any.
19. Select a `<Damage>` from the list by tapping on the arrow to the right of the field, if any.
20. Tap *Done* at the top of the screen when finished with your new, local, request.

Results

The new request appears at the top of the *Related Maintenance Request* list. It's marked as a *[LOCAL]* request, meaning it's only available on your mobile device, until you perform a sync with the back end. The request is sent to your SAP back end the next time you transmit. Continue working with the request, though note that you can't discard a request once you've synced to the back end.

6.3 Viewing or Adding a Follow-On Work Order

When you create a follow-on work order to an existing work order or notification, you create a relationship to the preceding order or operation. This relationship is displayed in the document flow.

You'll create follow-on work orders when you want to create a relationship between the main work order and a follow-on work order. This relationship is displayed in the document flow.

For example, while inspecting an equipment, you discover a defect. You perform the work for the original work order, but you also must document that there's a follow-on activity necessary. Creating a follow-on work order links the work orders together.

Viewing a Follow-On Work Order

To view follow-on work orders, tap the *Follow-On Work Orders* section on the main detail page of a work order. Then tap on a follow-on work order to few its details, such as description, order ID, due date, status, and priority.

Adding a Follow-On Work Order

Use the following procedure to add a follow-on work order to an existing work order:

> **Note**
>
> If the origination work order is still in a LOCAL state (not synced to the back end), you can't add a follow-on work order. If the original work order isn't released from the back end, the follow-on work order option isn't available.

1. Click to the work order or notification detail screen to which you're adding a follow-on work order.
2. Tap the + icon and select *Add Follow-Up Work Order*.
   The Add Follow-Up Work Order screen displays.
3. Ensure the *Follow-On Work Order* toggle switch is selected (it will be selected by default).
4. Fill in all fields. Note that the `<Description>` field is mandatory. When done, click *Next*.
   The Add Operation screen displays.
5. Change any of the operation fields if necessary. When finished, click *Done*.
   The follow-on work order is created. Sync to send the follow-on work order to the back end.

6.4 Adding a Task

Tasks are work that is planned under a notification.

Context

SAP Service and Asset Manager uses tasks to plan the ways in which various people at your site or company can work together to process the notification and to perform the activities in the notification within a specified period of time.

Most of the time, your tasks for a notification are already set up for you on the back end by an administrator. In these cases, you will mark your tasks as started, ended, and successful. See Making Status Changes to Notification Objects [page 105] for more details.

Use the following steps to add a task to a notification:

Procedure

1. Tap on the *Notifications* field from the main *Overview* screen.

   The Notification List screen displays.
2. Select and tap on the notification to which you want to add a task.

   The Notification Details screen for that notification displays.

3. Tap the + icon and then select *Add Task* from the menu selections.

   The Add Notification Task screen displays.
4. Add a `<Description>` and select a `<Group>` and a `<Code>`. Add an optional `<Note>` if desired. When finished, tap *Save* to save your task.

   > **Note**
   >
   > The `<Description>` field has a limit of 40 characters.

Results

Your new task is saved in the *Notification Tasks* list as a local task. Be sure to perform a sync to save the new task to the back end.

6.5 Adding an Activity

An activity report describes a maintenance or service activity that was already performed, or one that was not the result of malfunction or damage.

Context

An activity report provides technical documentation of which activities were provided when and with what results. Typical examples of activities documented in activity reports are 'Fill up oil', 'Check pressure', or 'Tighten screws'.

Use the following steps to add an activity to a notification:

Procedure

1. Tap on the *Notifications* field from the main *Overview* screen.

   The Notification List screen displays.
2. Select and tap on the notification to which you want to add an activity.

   The Notification Details screen for that notification displays.
3. Tap the + icon and then select *Add Activity* from the menu selections.

   The Add Notification Activity screen displays.
4. Add a `<Description>` and select a `<Group>` and a `<Code>`. Add an optional `<Note>` if desired. When finished, tap *Save* to save your activity.

> **Note**
>
> The `<Description>` field has a limit of 40 characters.

Results

Your new activity is saved in the *Notification Activities* list as a local activity. Be sure to perform a sync to save the new activity to the back end.

6.6 Adding an Item

Create a maintenance request to identify a problem, damage, or activity in greater detail than the original notification described.

Context

A maintenance request can contain multiple request items. You can enter data related to the maintenance request in a request item to determine additional problems, damages, or executed activities in greater detail.

Procedure

1. Tap on the *Maintenance Request* field from the main SAP Service and Asset Manager Overview screen.

   The Maintenance Request details screen displays.
2. Select and tap the request to which you want to add an item.

   The request detail screen displays.
3. Tap the + icon and select *Add Item* from the menu.

   The Add Maintenance Request Item screen displays.
4. Fill out the `<Item Description>` field. Then fill out the rest of the fields and tap *Done* to complete the item.

> **Note**
>
> The `<Item Description>` field has a limit of 40 characters.

Results

The maintenance request item is added to the maintenance request. See the *Post-requisites* section to add other details to the item. After you finish with the item, sync to the back end.

Next Steps

Once the maintenance request item is added, tap the + and select the menu options from the menu to add the following optional additional details to the item:

- Add Cause
- Add Task
- Add Activity
- Add to Note

6.7 Adding a Work Order

Context

If a notification does not yet have a work order associated with it, you can add a work order to the notification. If the notification already has work orders associated with the notification, the *Add Work Order* menu item is not available to you and you cannot add a work order to the notification.

You can tell if work orders are already associated with the notification if you see any work orders listed in the *Work Order* section. These work orders are current work orders. The work orders listed in the *Related Work Orders* section are historical, or past, work orders, that are related to the notification.

Procedure

1. Tap the + icon and select *Add Work Order*.

   The Add Work Order screen displays.
2. Fill out the fields. The `<Description>` field is mandatory. Tap *Done* when complete.

   > ⓘ Note
   >
   > The `<Description>` field has a limit of 40 characters.

   The new work order is populated in the *Work Order* section.

Results

Notice that when you tap on your newly created work order, it has a *Notification* section displaying the details of the associated notification where you created the work order.

Next Steps

Be sure to sync your device to save your new work order to the back end.

6.8 Taking a Reading

When working primarily at the notification level based on notification tasks, you can take measurement readings directly from the notification details screen.

When taking a measurement reading is called from a notification, it includes the technical object associated with the notification.

> ⓘ Note
>
> The measurement document is updated with the notification number.

To take a measurement point reading, select the desired notification from the *Notifications* screen, tap the + button at the top right corner of the *Notification* screen, and click *Take Reading*.

If necessary, you can filter measuring points in the following additional ways:

- Equipment
- Functional Location
- Operations
- Status: empty, in error

For more information on measurement readings and points, seee the Measuring Points and Readings Overview [page 97] topic.

6.9 Adding a Time Entry

Create a timesheet entry to log your activity while working on a specific task to keep track of completed tasks at work.

Context

Use the following steps to add a time entry to a notification:

Procedure

1. Tap on the *Notifications* field from the main *Overview* screen.

   The *Notification* list screen displays.
2. Select and tap on the notification to which you want to add an entry.

   The *Notification* details screen for that notification displays.
3. Tap the + icon and then select *Add Time Entry* from the menu selections.

   The *Add Time* screen displays.
4. Specify a date, duration of the work, absence or attendance code, work order, activity type, and operation if necessary.
5. When finished with your time entry, tap *Done* at the top of the screen.

Results

Your time entry is saved in the *Notification Activities* list as a local entry. Be sure to perform a sync to save the new time entry to the back end.

6.10 Adding a Time Confirmation

Context

Use the following steps to add a time confirmation to a notification:

Procedure

1. Tap on the *Notifications* field from the main *Overview* screen.

   The *Notification* list screen displays.
2. Select and tap on the notification to which you want to add an entry.

   The *Notification* details screen for that notification displays.
3. Tap the + icon and then select *Add Confirmation* from the menu selections.

   The *Add Time Confirmation* screen displays.
4. Specify a date, start time, duration of the work, account indicator, work order, activity type, variance reason, and operation or sub-operation if necessary.
5. If necessary, toggle the confirmation as final.

   > ⓘ Note
   >
   > If you set the confirmation as final, you can no longer change it.
6. When finished with your confirmation, tap *Done* at the top of the screen.

Results

Your time confirmation is saved in the *Notification Activities* list as a local confirmation. Be sure to perform a sync to save the new time confirmation to the back end.

7 Working with Maps

7.1 Maps Overview and Settings Options

Maps and geospatial data play an important part in the daily operations of many organizations.

By adding geospatial data to the technical data of an equipment, you get a full picture of that equipment. Maps allow you to visually see where your work orders, notifications, equipment, and functional locations are in relation to where you are or to other objects.

Use the following sections to learn how to customize your map view.

> ⓘ Note
>
> Full use and map features vary, depending on the selected geographic information system (GIS) supplier of your company and the implementation of the maps. Also note that geospatial data and coordinates are not maintained by SAP, they are maintained by your company or your GIS supplier.
>
> Map settings are defined in the back end. If you do not have access to one or more of the following options, it is because they are disabled by your administrator.

Searching Using the Maps View

For information on searching using maps, see the topic Searching using the Maps View [page 118].

Working with Map Settings

Tap the *Information* icon to adjust the following map settings:

- **Basemaps:** Select the type of map view, such as gray, streets, topo, or satellite
- **Reference (Feature) Layers:** Select different layers to see buildings, roads, or incidents overlaid onto your map, depending on what is programmed in your back end
- **Business Layers:** Select the dynamic layers setting to adjust how many or how few work orders, equipment, functional locations, and notification objects you see on your map

  > ⓘ Note
  >
  > Up to 100,000 business objects can be loaded.

- **Near Me Distance:** Sets objects within the specified near me radius of your current location
- **Near Me Units:** Sets the distance in either miles or kilometers

When finished adjusting the settings, tap *Close* to save your changes and close the *Settings* panel. You can adjust your settings at any time.

Toggling Device Location

Tap the *Navigation* icon to turn on device location.

When you initially install and log in to SAP Service and Asset Manager, device location is off. The first time you tap the *Navigation* icon, a pop-up displays with a question asking *Show your location on the map?*. Tap *OK* to give permission to enable and continue.

Enabling your location allows your device to center your location on the map and among the layers you selected to display using the map settings. Enabling your location also allows you to use any navigation features after you tap *Directions* on a selected object.

Automatic Zoom Out or Zoom In Function

Tap the *Zoom* icon to automatically refocus your map to the largest possible size that shows all objects and layers selected in the *Settings* options. Refocusing the map could mean that the map zooms in and enlarges the map or that the map zooms out to display all objects and layers selected.

If you feel that the map is too small to view all objects when you tap the *Zoom* icon, try selecting fewer feature layers and objects in the *Settings* options.

Adding and Editing Geo-coordinates to Maps

You can add end edit geo-coordinates on your map by tapping on the + icon in the map full screen or by tapping on *Use Map* under *Location* field in the business objectand technical object create pages, such as *Work Order*, *Notification*, *Equipment*, and *Functional Location*. The geometry types that you can select are point, polyline, and polygon. You can also undo and redo the last change, clear all changes, and cancel out of edit mode.

You can use your current location for setting the point type of geometry either in the Edit Panel in the map screen or by tapping on *Use current* under *Location* field in business object and technical object create pages.

After adding / editing the geometry data, the latitude and longitude pair are shown in the *Location* text field. For a locally created object, you can delete the geometry by tapping on *Remove* under the *Location* field in the create and edit pages.

Pagination

Pagination allows you to read business objects with geometry information in batches. You can configure the number of business objects per page. On Android, a banner message `All Business Objects have been loaded` displays after the pagination process. During the loading process, you can interact with the map UI.

> **Note**
>
> For configuration information, see the Configuration Guide.

Aggregation

When multiple objects are very close or overlap in the map, the objects and object details are visible without adding any filters or hiding any layers. When you select an area on the map where overlapping objects are located, details of multiple objects are represented in a list.

> **Note**
>
> Aggregation is supported only on business layers.

Offline Maps

Offline map support allows you to download basemaps and feature layers to your mobile device, so you can view maps, objects, and layers when there's no network connection. You can specify the basemaps and feature layers to download. You can also specify the region to download.

For detailed information on offline maps, see the Using Offline Maps [page 119] topic and associated subtopics.

7.2 Searching using the Maps View

The Maps view has some common work order searches built into the application for you, such as Work Orders Due Today, High Priority, and Near Me.

The SAP Service and Asset Manager application has made it easy for you to search for the work orders you must access right away with three built-in search queries. To find the search queries, from the Overview page, tap the map. When the main Map page displays, tap the *Magnifying Glass* icon.

A *Search* list displays on the far left of the map screen. Notice there are three buttons underneath the search field. You can type in any search terms you like in the search field at any time. However, an easy way of displaying the most time sensitive and critical jobs is to tap any one of the three buttons: *Work Orders Due Today*, *High Priority*, or *Near Me*.

You can tap any of the buttons or all of the buttons. Tapping more than one button filters the list even further. You can untap a button if the results you get are too filtered.

When satisfied with your filtering, you can tap on an item on the filtered list to see the work order details. Or, you can tap on the map to exit out of the search list to see the entire map. You can then tap on one of the icons on the map itself to see the details of that object or to get directions to the object from the map.

> **Note**
>
> The *Near Me* filter is only available when you have *Device Location* enabled. See the Maps Overview and Settings Options [page 116] to learn more about the device location feature.

7.3 Using Offline Maps

Offline map support allows you to download basemaps and feature layers to your mobile device, so you can view maps, objects, and layers when there's no network connection. You can specify the basemaps and feature layers to download. You can also specify the region to download.

You can easily tell from the UI if you are in offline or online mode. If network connectivity is lost, the application gives you the option to revert to a previously downloaded map so that you can continue work. You work with offline maps the same way you're currently working with online maps. All application functions are available when you're using a downloaded map.

7.3.1 Loading Pre-Built Cached Maps

You can add prebuilt maps provided by your administrator to a folder structure on your mobile device. When you're offline, you can access the cached maps from the SAP Service and Asset Manager application and work with them as if you're online.

7.3.1.1 Adding Base Maps and Feature Layer Files for iOS

Context

Add a prebuilt base map or feature layer to your iOS device using the following steps:

Procedure

1. If the *Files* application isn't already installed on your device, download it and install it from the App Store.

   Once the SAP Service and Asset Manager app and the Files app are installed, a folder named *Asset Manager* is created in the Files app.
2. Create a new folder and subfolder within the *Asset Manager*. The resulting folder path is `Asset Manager/ArcGIS/Offline`.
3. Move your `.tpk` (for basemap) and `.geodatabase` (for feature layers) files to the *Offline* subfolder.

4. Ensure that each file name is unique to avoid confusion. For example, if you have multiple files for the same basemap but with different areas or regions, give each file a unique name that makes sense to you.

Results

Your downloaded basemaps and feature layer files are available for viewing offline.

7.3.1.2 Adding Base Maps and Feature Layer Files for Android

Context

Add a prebuilt base map or feature layer to your Android device using the following steps:

Procedure

1. Navigate to *Settings* > *Apps* on your mobile device. Select the SAP Service and Asset Manager application.
2. Give permission to allow storage in *App Permissions*.
3. Navigate to the *Downloads* folder:
   - Create a new folder called ArcGIS and a folder under that called Offline
     The resulting folder path is Downoads/ArcGIS/Offline
   - Create a new folder called SAP
     The resulting folder path is Downoads/SAP
4. Move your `.tpk` (for basemap) and `.geodatabase` (for feature layers) files to the *Downoads/ArcGIS/Offline* and *Downoads/SAP* .
5. Ensure that each file name is unique to avoid confusion. For example, if you have multiple files for the same basemap but with different areas or regions, give each file a unique name that makes sense to you.

Results

Your downloaded basemaps and feature layer files are available for viewing offline.

> **Note**
>
> Make sure to use the *OfflineBaseMap.tpk* file from the *External Offline Map* folder from *Settings* > *Offline Maps* in case of error-free operation.

7.3.2 Downloading and Accessing Offline Basemaps and Feature Layers

You can select a basemap as well as one or more feature layers to download to your mobile device in the event that you're working offline. The downloaded basemap and feature layers function in the same way as an online basemap would.

> **Note**
>
> Your company can provide you with preset offline maps or feature layers for you to download. See the Loading Pre-Built Cached Maps [page 119] topic for information on how to install these objects to your mobile device.

Creating an Offline Basemap and Feature Layers

You can specify multiple basemaps for download. If you download a map using an already cached basemap, the newly downloaded file overwrites the previously saved file so that multiple copies of the same basemap aren't saved.

You can also download feature layers to your mobile device, so you can view these feature layers, along with associated business objects, when there's no network connection. You can specify multiple feature layers for download. If you download an already cached feature layer, the newly downloaded file overwrites the previously saved file so that multiple copies of the same feature layer aren't saved.

Use the following instructions to create an offline basemap.

1. Navigate to the *Map* main page of the SAP Service and Asset Manager application. Tap the *Settings* icon to access the *Settings* panel.
2. Tap the *Offline Maps* section.
   The *Offline Maps* panel appears. If you haven't yet downloaded an offline map, a message states that there are no cached maps available. If there's a cached map already on your mobile device, information about that map displays, such as the time and date it was downloaded and cached. You can either delete this cached map or save a new offline map over it.
3. Tap *Download Maps*.
   The *Download Maps* panel displays.
4. Select the basemap and any feature layers you want to include on your offline map. You can select only one basemap. You can select one, more than one, or all of the feature layers to display on your offline map. When finished with your selection, tap *Next*.

   > **Note**
   >
   > Make sure to use the *OfflineBaseMap.tpk* file from the *External Offline Map* folder from *Settings* > *Offline Maps* in case of error-free operation. After downloading another offline map and then uploading it, there is an option to switch between offline maps in the settings.

   You're returned to the main *Map* screen. There's a gray rectangle surrounding your map.
5. Use your fingers to pinch or zoom the map area you wish to cache. When satisfied with your map area, tap *Download*.

Before the application downloads your selections, you're notified of the file size of the download. If the file size is too large, you can adjust the selected download region. A progress bar is displayed during the download. After the download is complete, you receive a notification about the success of the download, or if any errors occurred.

6. You can now work with your cached map as you would an online map. All utility of an online map is available, except switching to a different basemap or feature layers.

Accessing an Offline Basemap and Feature Layers

When using an offline basemap, SAP Service and Asset Manager makes it clear in the UI that you're working from an offline map. When network connectivity is present, you can switch to working with an online basemap if desired.

Use the following procedure to access any saved offline basemaps if you're working with the application offline. If you don't have any cached maps saved, move to working online and follow the previous procedure in this topic to download maps for offline use.

1. Navigate to the *Map* main page of the SAP Service and Asset Manager application. Tap the *Settings* icon to access the *Settings* panel.
   If you're offline, a message appears asking if you would like to load cached maps. Tap *Continue* to load offline maps. Your saved offline map loads. You can work with the offline map in the same way as an online map.
   If you're online but want to work from a saved cached map, select *Load Cached Map*.
2. Tap the *Settings* icon and then the *Offline Maps* section to access offline maps information.
   The *Offline Maps* panel appears.

   > **Note**
   >
   > Make sure to use the *OfflineBaseMap.tpk* file from the *External Offline Map* folder from *Settings* > *Offline Maps* in case of error-free operation. After downloading another offline map and then uploading it, there is an option to switch between offline maps in the settings.

3. When you can work online again, tap *Switch to Online Map* to move from working with your saved offline map to the online map.

8 Working with Linear Asset Management

8.1 Linear Asset Management (LAM) Overview

Linear assets are technical systems with a linear infrastructure whose condition and properties can vary from section to section (dynamic segmentation). You can see linear asset data associated with various objects such as work orders, operations, technical objects, and notifications.

Examples of linear assets include pipelines, roads and railway tracks, or overhead power lines and cables.

LAM enables you to create linear assets as technical objects (such as functional locations and equipment) and store linear data. You can carry out maintenance tasks for these technical objects, which result in notifications, work orders, and measurement documents. These tasks allow you to:

- Monitor the condition of your linear assets
- Identify where there's damage or defects using the start point, end point, and offset
- Manage all types of maintenance tasks such as planned, unplanned, and preventative

You can download and see linear assets and linear asset properties for the following objects:

- Work order
- Notification
- Notification item
- Functional location
- Equipment
- Operation
- Measuring point
- Measurement document
- Confirmation

Once you download the linear assets, you can see the following details for the objects:

- Linear reference pattern (for equipment and functional locations only)
- Start and end points
- Length and unit of measurement
- Start and end markers
- Distance from start and distance from end
- Perpendicular and vertical offsets

You can also download characteristic values linear data for equipment and functional locations. You can see start and end points as well as length and unit of measurement in the properties of the downloaded data.

8.1.1 Accessing Linear Asset Management

> **Note**
>
> You can edit linear data on equipment and functional locations. To learn more, see the Editing, Adding, or Deleting Linear Data [page 124] topic.

You can access the linear data for a work order, operation, notification, item, equipment, or functional location through the *Linear Data* section on the applicable detail screen. If no linear data exists for the specific item, the section isn't displayed on the screen.

Once you tap the *Linear Data* section, the linear data displays in a read-only window. The *Linear Data* window displays four sections of information, as applicable.

- Point Location
  - Start
  - End
  - Length
- Marker (this section doesn't display if no Linear Reference Pattern (LRP) number is provided)
  - Start
  - End
  - Distance From Start
  - Distance From End
- Offset 1
  - Type
  - Offset
- Offset 2
  - Type
  - Offset

8.1.2 Editing, Adding, or Deleting Linear Data

You can edit, add, or delete the following from linear asset data:

- Edit LAM data for classification characteristics
- Add linear data to a classification characteristic
- Delete locally added linear data

Editing Linear Data

1. Navigate to an object such as an equipment or a functional location that contains LAM data. Navigate to the *Classification* information of the linear data.

2. Select a linear data row you wish to edit.
3. Tap *Edit* and select *Edit Characteristic*.
   The *Edit Characteristic* window displays.
4. Edit any value fields necessary.
5. Transmit your changes to the back end. Verify that your changes appear in the selected linear data.

Adding Linear Data

You can add additional linear data to already existing LAM data objects.

1. Navigate to an object such as an equipment or a functional location that contains LAM data. Navigate to the classification information of the linear data.
2. Tap *Edit* and select *Add Linear Data*.
   The *Add Linear Data* window displays.
3. Add values to all applicable fields.
   The new linear data appears in a new row on the *Classification* screen.
4. Transmit your changes to the back end. Verify that your additions appear in the linear data rows on the *Classification* screen.

Deleting Local Linear Data

Any linear data you add that hasn't yet been transmitted to the back end can be deleted. Select the new linear data you want to delete by tapping on the *Information* icon on the far right side of the row. When the *Edit Linear Data* window displays, select *Discard*.

Your local linear data is discarded. Note that any information you've sent to the back end is no longer local and can't be discarded.

8.1.3 Taking Measurement Point Readings

You take measurement point readings on a LAM object the same way you take measurement point readings for an equipment or a functional location.

See the Measuring Points and Readings Overview [page 97] topic and subtopics for detailed information.

8.1.4 Adding and Editing a Measurement Document

Create a measurement document to enter or edit data measured from a measuring point or read on a sensor.

You can create measurement documents on linear measuring points for both equipment and functional locations.

After adding a new measurement document or editing an existing document, be sure to transmit to the back end to save your changes.

Adding a Measurement Document

1. From the main *Equipment* or *Functional Location* screen, select a LAM equipment.
2. From the object detail screen, select the measuring point to take a new reading.
   The measuring point detail screen displays.
3. Tap *Take Reading* on the top right of the screen.
   The *Take Reading* screen displays.
4. Add your measurements for the reading. When complete, tap *Done*.
   A message displays telling you the reading is taken.

Editing a Measurement Document

You can edit a local measurement document as long as you haven't yet transmitted to the back end. For information on editing objects, see the Editing an Object [page 30] topic.

9 Working with Time

9.1 Time Sheet Overview

The time sheet provides a standardized time entry function for employees.

Time sheets are used to enter person-related working times for the SAP Service and Asset Manager application through a single transaction. Employees maintain their attendance times, periods of absence, and working times personally in the system, together with information about the work order, notifications, and so on. The data is then transferred from the client device to the back end system during a transmit.

> **Note**
>
> If you are a crew supervisor and are using SAP Service and Asset Manager with the Crew Management solution, see those topics for the component for more information on adding and editing time entries. Start with the Crew Management Overview [page 138] to learn more about the solution.

9.2 Accessing Time Sheets or Time Records

> **Note**
>
> Time sheets are used in the Maintenance Technician persona, and time records are used in the Field Service Technician persona. You interact in the same way with time sheets and records.

Access your time entries by tapping on the *Time Sheets* or *Time Records* section on the main *Overview* screen. Or, tap on the *Time Sheets* or *Time Records* option on the sidebar menu.

A detail screen displays, showing a list of all your time entries. You can select and tap any of these line items to access the time entry details.

Editing a Time Entry

You can edit any locally created time entry, as long as you have not yet synced that time entry to the back end. Tap on the time entry to access the *Edit Time Entry* screen. For information on editing any type of object in SAP Service and Asset Manager, including a time entry, see the Editing an Object [page 30] procedure.

Note that you cannot edit or discard any time entries that you have already synced with the back end.

Discarding a Time Entry

You can discard any locally created time entry, as long as you have not yet synced that time entry to the back end. Tap on the *Edit Time Entry* screen. To discard the time entry, tap on *Discard* found at the bottom of the screen. A Confirm Discard pop-up message displays. Tap *OK* to confirm the time entry discard.

Note that you cannot edit discard any time entries that you have already synced with the back end.

9.3 Adding a Time Sheet Entry

When you start a work or service order, time is automatically logged in that order until you put it on hold, transfer it, or complete it. However, you can also manually add a time sheet entry.

Context

Manually add a time sheet entry to log time not associated with specific work or service orders, such as sickness or educational activities. You can also add time to existing orders that are assigned to you.

Procedure

1. Tap *Time Sheets* from the main Overview page. Or, select *Timesheets / Confirmations* from the sidebar menu.

   The Time Sheets screen displays.
2. Tap the + icon to add a new time entry.

   The Add Time screen displays.
3. Fill out the appropriate fields. When finished, tap *Done*.

Results

A time entry is logged for you. See the Accessing Time Sheets or Time Records [page 127] topic to learn how to edit or discard a time entry that you have not yet synced to the back end.

9.3.1 Working with Overtime Labor Entries or Entries that Span Multiple Days

SAP Service and Asset Manager provides the ability to log labor time for workers whose shifts extend across a span of days, as well as other similar scenarios.

Logging overtime labor entries, or labor entries that span across multiple days, works in the same way as a labor entry that spans an ordinary 8-hour shift. See Adding a Time Entry [page 141] for more information.

The difference between a normal 8-hour shift and a shift that spans across days, however, shows in the *Confirmation* screen for the labor time entry as well as in the *Confirmations* detail screen. The *Start Time* is based on when you start either the work order or manually begin a new labor time entry. The *End Time* is input by you, the user, when the work order or labor time entry is complete. Note that you can have different days for a *Start Time* and *End Time*.

However, note that the date displaying on the *Confirmations* detail screen displays only the start date as updated after you input an end time. This is normal behavior for the application, and your hours are recorded.

The same principle applies if you finish your work for the day, log off, and put the work order on hold the following day. When you update your labor time entry, the *Confirmations* detail screen shows only the start date as updated for the entry. If you tap on the labor time entry to access the *Confirmation* detail screen, you can see that all details are logged correctly for your labor time entry.

9.3.2 Adding Time for Another Technician

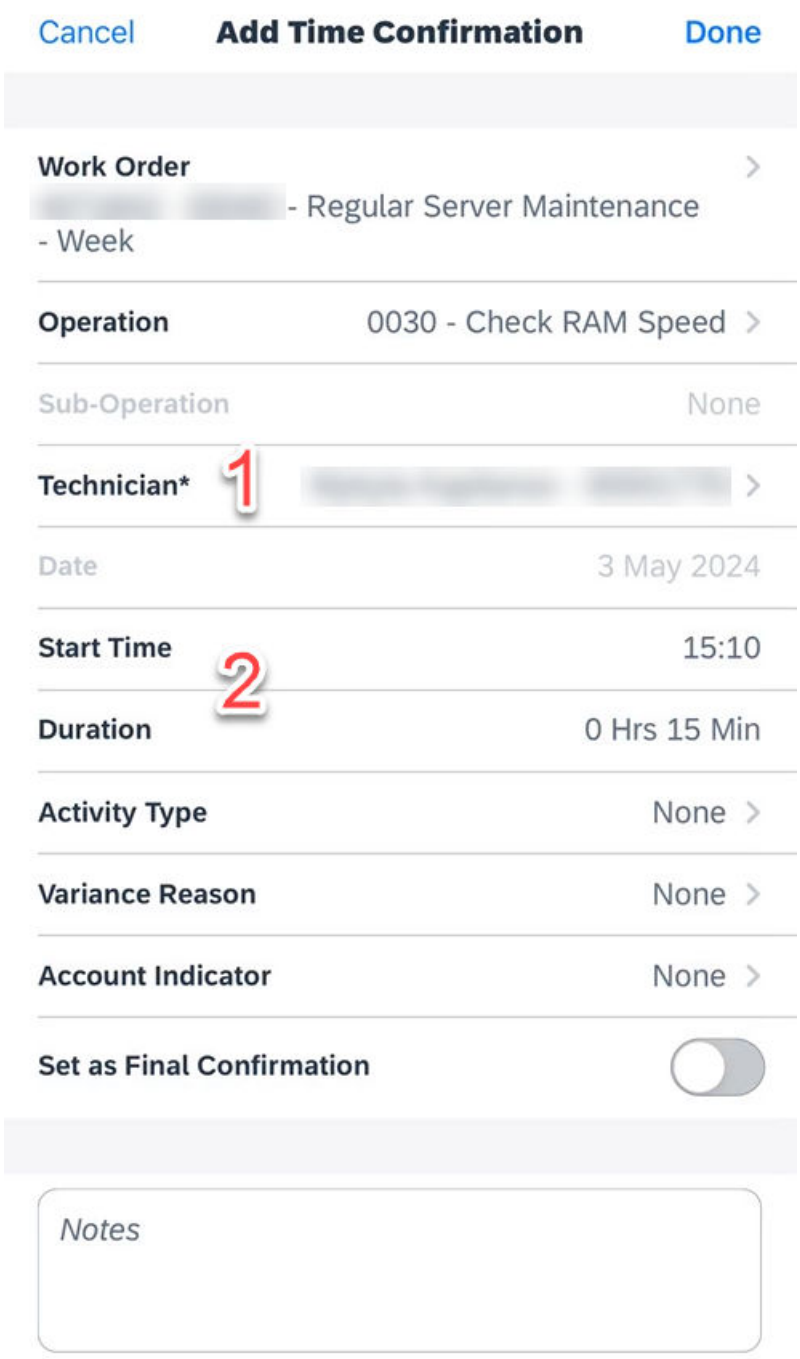
Context

If this feature is enabled by the administrator, you can add time entry for another user in the application in:

- PM time confirmations
- CATs timesheet

> **Note**
>
> For configuration steps of this feature, see Allow Technician to Enter Time for Another Technician - Configuration.

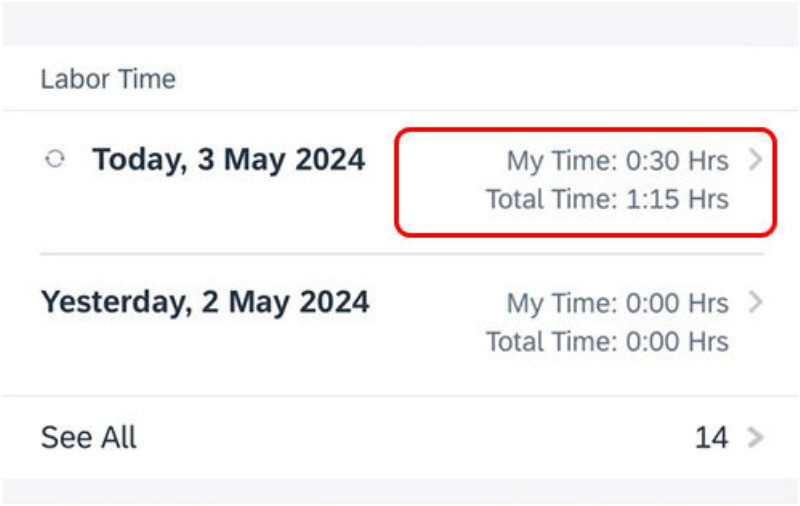
To add a time confirmation for another user, perform the following steps:



Procedure

1. Tap the *Technician* field and select the Techician from the list you want to enter time to.
2. Set *Start Time*, *Duration* and other mandatory fields.

3. Once added, under *Labor Time* you will see:



- *My Time*: As the time added to your user.
- *Total Time*: As the time added up by all users' time.

> **Note**
>
> In case of CATs Time Sheets, the same procedure applies.

9.4 Working with Clock In Clock Out

The Clock In Clock Out (CICO) feature decouples time tracking from the mobile status of a work order or operation, allowing multiple users to start and log time against the same work order or operation simultaneously.

Clock in clock out, or CICO, allows multiple users to work on the same work order or operation, where all users receive the work orders and operations to their devices. CICO allows multiple work orders and operations to be in the Started state that belong to different users. Mobile device users are able to see the CICO state of all work orders or operations on their device.

Users can also use the search bar to find work order or operations lists based on clock in or clock out status. Search on *clock in*, *clocked in*, *clock out*, or *clocked out*.

Working with CICO Work Orders or Operations

If CICO is enabled on your SAP Service and Asset Manager application:

- Multiple people can work on the same work order or operation even if the work order or operation is already in the *Started* state by another user
- All users can see the CICO status of work orders or operations on their device

- When you clock in to a work order or operation:
  - You can clock in to any work order or operation on your device
  - You can only clock in to one work order or operation on your device at a time
  - The timestamp of the work order or operation is saved to your user ID in the back end
  - The mobile status of the work order or operation is set to *Started* if it isn't already in a started state
- When you clock out of a work order or operation:
  - The work order or operation status is set to either *Hold* or *Complete*
  - If a work order or operation is set to *Complete* and confirmation time is used, you can set it as the final confirmation
  - You must clock out of your current work order or operation before clocking in to a different work order or operation

If CICO is not enabled on your SAP Service and Asset Manager application:

- Muliple users cannot work on the same work order or notification
- You can start any work order or operation in a *Received*, *Hold*, or *Local* state, as usual

Working with CATS or Confirmation Time on CICO Work Orders or Operations

If CICO is enabled on your SAP Service and Asset Manager application:

- All time recording (CATS and Confirmation) uses the clock in clock out period as the default duration in time entry screens

If CICO is not enabled on your SAP Service and Asset Manager application:

- CICO time entry is accomplished through status changes of the work order or operation.

10 Functional Location Overview

Functional locations, or FLOC, are elements of a technical structure. Think of FLOC as functional units within a system.

If you have a long list of functional locations on your *Functional Location* detail screen, you can either perform a search for a specific functional location or use the filter function. See the following topics for information on how to use the filter and search features:

- Filtering Objects [page 27]
  You can filter based on the *Mobile Status* of the functional location. You can also *Sort by* ID, Description, Plant, Work Center, and Location. Other filtering options may become available to select depending on your *Mobile Status* and *Sort by* choices.
- Searching for Objects [page 27]
  Search for a specific functional location based on the displayed properties of the functional locations on your mobile device.

Access your functional location list from the *Overview* screen by tapping the *Technical Objects* section in the KPI section of the app. Or, by one of the additional ways. See Technical Objects Detail Screen [page 87] for more information.

You can perform the following actions on existing functional locations in SAP Service and Asset Manager:

- Add work orders to a functional location. See Adding a Local Work Order [page 53].
- Add maintenance requests to existing functional locations. See Adding a Notification [page 107]
- Add documents to a current functional location. See Working with Attachments [page 32]
- Add or dismantle equipment to a current functional location. See the following topics:
  - Installing Equipment [page 95]
  - Dismantling Equipment [page 96]
- Take readings of measuring points associated with functional locations. See the Measuring Points and Readings Overview [page 97] topic and subtopics.
- View and complete checklists, if any are associated with the functional location. See the Checklists [page 90] topic for more information.
- View related maintenance orders, maintenance requests, equipment, classifications, hierarchy, and business parters associated with the functional location
- View linear asset data associated with the functional location. See the Linear Asset Management (LAM) Overview [page 123] topic and subtopics for more information.
- View notes, if any are associated with the functional location.
- View a functional location using hierarchy. See the Hierarchy Control Overview for more information.

> **Note**
>
> - You can edit local *Functional Locations*, as well as already existing ones.
> - As of 2410, you, as a Field Service Technician Persona Pro, can create new functional location based on previously created functional location.

10.1 Creating Functional Location

You can create functional locations in the following ways:

- You can create a new functional location.
- You can create a functional location from an existing functional location.
  You can edit *Functional Locations* only if they are local.

Creating a New Functional Location

1. Tap on the + icon from the main object screen, *Functional Location*.
2. Fill out the following mandatory field:
   - *Category*
   - *Structure Index*
   - *ID*: The functional location ID format is based on the *Structure Index* format, and it must be in the following format:

Structure	Structure Index Text for Functional Locations	Edit Mask
A	Structure A	XXXX-XXX-AA-NN
B	Structure B	AAN-ANNN-NNNN
C	Structure C	XX-XNN-N-X/X
D	Structure D	AAN-ANNN-NNNNNNNNNNNNNNNNNNNNNNNNNNNNNNNNNN
ISRE	RE Real Estate	XXXXXXX/XXXXXXXX/XXXXXXXX
RE-FX	Real Estate Extension	SSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSS
REFX	RE-FX: Flexible Real Estate Management	SSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSS
Z	Customer Naming Simulation	XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXXX

     - A: alphabetical characters
     - N: numerical characters
     - X: alphabetical and numerical characters
     - X: alphabetical, numerical and the following special characters: &()+,./:;<=>
   - Description
3. You can edit the optional fields.
   - Location: You can use your current location by tapping on “Use Current” or you can use another location by tapping on Use Map.

- Maintenance Plant: The maintenance plant that your functional location belongs to.
- Superior FLOC:
- Start Date: The start date of your functional location.
- Manufacturer Name
- Date of Manufacture
- Model Number
- Serial Number
- Plant Location
- Room
- Note
- Attachment: You can attach photos and files to your functional location.

Creating a Functional Location from an Existing Functional Location

1. Tap on the + icon from the main object screen, *Functional Location*.
2. Check the *Template* box under *Create From* to select a template.
   A new *Template* field is displayed, where you can select your template. Certain fields are automatically filled depending on the selected template type.

> **Note**
>
> After you finish creating a new functional location, you cannot edit the reference functional location and the template fields.

11 Working with Hierarchy Control

11.1 Hierarchy Control Overview

When navigating using hierarchical node structures, you can tap on a parent to expand the node and view the children of the parent. You can also navigate up or down from that node location, opening or closing nodes as you go.

Hierarchy control is used to navigate both equipment and functional location lists. The hierarchical control views are used in the following locations and ways:

- Viewing an equipment hierarchy from the Equipment detail screen
- Viewing a functional location hierarchy from the Functional Location detail screen
- Viewing a functional location hierarchy from within a work order
- Viewing a functional location hierarchy from a notification
- Viewing an equipment hierarchy from the main Map view
- Viewing an equipment hierarchy from a notification
- Viewing an equipment hierarchy from an operation or a suboperation
- Viewing an equipment hierarchy from within a work order
- Viewing a bill of materials (BOMs) hierarchy from an equipment or functional location
- Viewing an assembly hierarchy from the Work Order detail screen

Viewing Lists Using Hierarchy

1. Tap on your selected object (equipment, functional location, or BOM) from the main object screen.
   The *Detail* screen for the selected object displays.
2. Tap the *Hierarchy* section for your selected object.
   The *Hierarchy* screen displays the selected object as the parent object, the child object of the parent object, and any children objects of the child object up to three levels deep in three columns. If the selected object is not the root oject, its parent object(s) display in the left overflow column.
3. Navigate through the hierarchy by tapping on any parent or child object. Tapping on an object displays the detail screen of the object.

Selecting Items Using Hierarchy

When you use the add wizard to add either an equipment object or a functional location object that is part of a hierarchy, with a parent object and children objects, you use hierarchy to select the desired object.

1. Tap on the + icon from the main object screen (either *Equipment*, *Functional Location*, or *Bill or Materials*) and select *Installation*.

The *Install <Object>* window appears.

2. When you tap on an object to install that is part of a parent-child hierarchy, you'll see a small icon to the right of the object, indicating a hierarchy and the ability to select children objects under the parent. Under the icon is a numeral, indicating how many children are under the parent object.

   > ⓘ Note
   >
   > If you're using an Android device to work with the app, the small icon to the right of the object does not immediately appear. The icon displays after you tap on a parent row.

3. To navigate back and forth between a parent and its children objects, tap the appropriate hierarchy control icon.

11.2 Hierarchy Control List Picker

When navigating using hierarchical node structures, you can tap on a parent to expand the node and view the children of the parent. You can also navigate up or down from that node location, opening or closing nodes as you go.

The hierarchy control list picker is implemented for selecting equipment or functional locations while creating or editing the following:

- Work orders
- Operations
- Suboperations
- Notifications

> ⓘ Note
>
> The hierarchy control list picker is only supported as a single list picker. For more information, see the Hierarchy Control Overview topic.

12 Working with Crew (CS)

12.1 Crew Management Overview

Crew Management is an optional component that allows supervisors and team leaders to manage their crew and vehicles with significantly lower cost and greater flexibility.

> ⓘ Note
>
> The Crew Management feature is **only** supported in the Customer Service (CS) scenario. For the SAP S/4HANA Service scenario, use the FSM Crew feature.

Only use the Crew Management functions in SAP Service and Asset Manager if you are in a team lead or a supervisory role on your job crew or site.

As a supervisor or team lead, Crew Management helps you identify which team members on your crew are available to work, and which vehicles in your fleet are available for use. At the end of each shift, it allows you to log the miles used on each vehicle and the hours each crew member worked.

Crew Management adds the following functionality to the core SAP Service and Asset Manager application:

- Select, add, and remove crew technicians as needed
- Selecf, add, and remove vehicles as needed
- Track vehicle usage through vehicle odometer readings
- Review and adjust time for crew technicians
- View time summary of your crew technicians over a two week period

> ⓘ Note
>
> If you do not see the features and functions described in the following topics, the Crew Management component is not installed on your mobile device. Talk to your site administrator if you believe you should have access to this component. See Time Sheet Overview [page 127] and the accompanying topics for more information on time entries when Crew Management is not installed.

See the following topics for information on how to perform your Crew Management duties within the SAP Service and Asset Manager application:

- Adding Crew Members [page 139]
- Adding Vehicles [page 140]
- Adding a Time Entry [page 141]
- Editing a Time Entry [page 141]
- Removing Crew Members or Vehicles [page 142]
- Editing a Vehicle Odometer [page 142]

12.2 Adding Crew Members

Context

Before you can work with your crew in SAP Service and Asset Manager, first add crew members to your crew list. Initially, your crew list is empty when you open the application. As you add crew members, they are displayed in the *Selected* section at the top of the screen.

Use the following procedure to add your crew members to your crew list:

Procedure

1. From the main overview screen, tap the *Crew* section.

   The Crew Detail screen displays. If you have never set up your crew before, your *Current Crew Members* section is empty.
2. Tap the + icon and select *Add Crew Member*.

   The *Add Crew Member* screen displays.
3. Tap the *Crew Members* row to see your crew member options.

   A list of crew members available to you appears, along with a search field at the top of the list.
4. Select your crew members. You can select more than one crew member on the list. When finished with your selections, tap the *Add Crew Member* on the top left of the screen. Your crew member choices are saved and you are returned to the previous screen.
5. Tap the *Back* icon at the top left corner of the screen.

   You are returned to the previous screen where you'll see a list of crew members you selected in the *Crew Members* section.

Results

Your crew members are added to your crew list. If you have accidentally added the wrong crew member, see the topic Removing Crew Members or Vehicles [page 142] for information on removing the member.

Tap on any crew member to see additional details about that crew member. Details are read only. Tap on the phone icon ( ) to initiate a call to the crew member. Or, you can tap on the envelope icon ( ) to start an e-mail to that crew member.

Next Steps

When you are ready to add time entries to the members of your crew, see the topic Adding a Time Entry [page 141]. To add vehicles for your crew, see the topic Adding Vehicles [page 140].

12.3 Adding Vehicles

Context

Before you can work with your vehicles in the SAP Service and Asset Manager application, first add the vehicles to your vehicle list. Initially, your vehicle list is empty when you open the application. Use the following procedure to add your vehicles to your vehicle list.

Procedure

1. From the main overview screen, tap the *Crew* section.

   The Crew Detail screen displays. If you have never set up your vehicles before, your *Vehicles* section is empty.
2. Tap the + icon and select *Add Vehicle*.

   The *Add Vehicle* screen displays.
3. Tap the *Vehicles* row to see your crew member options.

   A list of vehicles available to you appears, along with a search field at the top of the list.
4. Select your vehicles. You can select more than one vehicle on the list. When finished with your selections, tap the *Add Vehicle* on the top left of the screen. Your vehicle choices are saved and you are returned to the previous screen.
5. Tap *Done* on the Add Vehicle screen to return to the Crew screen.

   The vehicles you selected populate in the Vehicles section. Tap *See All* to see the full list.

Results

Your vehicles are added to your crew list. If you have accidentally added the wrong vehicle, see the topic Removing Crew Members or Vehicles [page 142] for information on removing the vehicle.

Tap on any vehicle to see additional details about that vehicle. You can change the odometer reading on a vehicle. See the topic Editing a Vehicle Odometer [page 142] for more information.

12.4 Adding a Time Entry

Context

As a crew supervisor, it is your responsibility to report the time of every member of your crew for each time period worked. Try to add the time for each crew member after every shift that crew member has worked, so the time entry is accurate. However, you can review and edit time entries for your entire crew for up to 2 weeks, or 14 days, after you have entered their labor time.

Procedure

1. Tap the *Time Sheets* section from the main Overview page. You can either tap on *Today* to view your current crew members, or tap *See All* to view the past 14 days of time logged.
2. Tap the + icon to add a new time entry.

   The Add Time screen displays.
3. Fill out the appropriate fields. When finished, tap *Done*.

Results

Time entry is logged for the crew member you selected on the *Add Time* screen. Perform this procedure for each crew member on your crew daily. If you must edit a time entry, see the Editing a Time Entry [page 141] procedure.

12.5 Editing a Time Entry

You can edit any time entry for a crew member in a 14-day period. To edit a time entry:

1. Click a crew member on your list with a time entry that you want to edit.
2. Click the time entry of the crew member to edit so that the *Time Entry* detail screen displays.
3. Tap the *Edit* button. The Edit Time screen displays.
4. Make any edits to the time entry you desire. If you want to delete the time entry, tap *Discard* at the bottom of the screen. When complete, tap *Done*.

The update to the time entry is successful and your changes are displayed in the Time Entry details screen for that crew member.

12.6 Removing Crew Members or Vehicles

Removing a Crew Member

To remove a crew member from your crew list, tap the crew member you want to remove in the *Current Crew Members* section of the Crew Detail screen. When the Crew Member Detail screen for the crew member displays, tap *Remove* at the bottom of the screen.

If the time sheet is incomplete for the crew member, a pop-up displays, asking if you want to record time for the crew member. Tap *OK* to record time. You are then taken to the time entry screen. See Adding a Time Entry [page 141] for information on how to add time.

If the time sheet is incomplete, you do not want to record time, and you want to remove the crew member from your team, tap *No* to remove them without recording time. The crew member is removed from the crew member list.

If the time sheet is complete for the crew member, you are asked to confirm their removal only. Tap *OK* to confirm the removal.

Removing a Vehicle

To remove a vehicle from your vehicle list, tap the vehicle you want to remove in the *Vehicles* section of the Crew Detail screen. When the Vehicle Detail screen for the vehicle displays, tap *Edit*, then tap *Remove*, located at the bottom of the screen. Tap *OK* to confirm the removal.

12.7 Editing a Vehicle Odometer

If your company requires you to keep track of vehicle mileage, you can edit the odometer readings on each vehicle to reflect the distance that vehicle was driven during a set time period. To edit an odometer on a vehicle, perform the following steps:

1. From the main overview screen, tap the *Crew* section.
2. In the *Vehicles* section, tap the vehicle to which you are changing the odometer. To see all of the vehicles, tap *See All*.
   The Vehicle Detail screen displays.
3. Tap *Edit*.
   The Edit Vehicle screen displays.
4. Note the *Previous Reading*, which is the previous odometer reading. Tap in the *Odometer* field and add the new odometer reading, making sure it is higher than the previous reading. Tap *Done* when finished entering the reading.
5. Tap *Done* at the top right to return to the Vehicle Detail screen.
   Your new odometer reading is displayed along with the previous odometer reading.

Be sure to sync your device to save your odometer readings to the back end.

13 Working with Field Operations Worker

13.1 Field Operations Worker Add-On Component

Field Operations Worker, or FOW, is an add-on component to SAP Service and Asset Manager. If you do not see FOW features while using the SAP Service and Asset Manager application, your site has not installated the component.

SAP Service and Asset Manager for Field Operations Worker leverages the digital core with SAP S/4HANA for task driven activities and rounds. It supports workers who perform asset inspections and checks with focus on measurement points and on smaller services and repairs.

13.1.1 Field Operations Worker Overview

Use the Field Operations Worker (FOW) component to see the routes that you are assigned to. A route indicates stops as well as the collection of technical objects at each stop.

Field Operations Worker adds the following functionality to the core SAP Service and Asset Manager application:

- **Display routes on map:** As a field operations worker, you can see a quick preview of your assigned routes from the *Overview* and *Map* pages
- **View routes data:** On the *Route Details* page, you can see information such as the ID, a description of the route, the priority of the route, the due date of the route, location, and the number of stops on the route
- **View stops data:** On the *Stops Details* page, you can see information such as location, and the technical objects at the stop
- **Rapid field data capture:** Allows you to take readings for all of the measuring points assigned to one technical object, on a single screen

13.2 Working with Routes

13.2.1 Routes Overview Page

As a field operations worker, you can see a quick preview of your routes from the *Overview* page. On the *Overview* page map, you can select and deselect routes to show or hide them on the map. Hiding routes on the map does not hide technical objects (assets).

The following details are available for each route:

- Route description (equivalent to the order description) ex: Freeway Route

- Route ID (equivalent to order number)
- Number of stops
- Route status
- Route priority
- Route Due Date

You can see up to four routes that are due to be completed (in the *Routes section*). To see the complete list of assigned routes, click *See All.*

13.2.1.1 Route Details

When you select a route on your *Routes List*, you navigate to the *Route Details* page. On the *Route Details* page, you can see the details pertaining to the route, as well as the stops that belong to this route.

Route details include:

- ID
- Description
- Priority
- Order Type
- Mobile Status
- Due Date
- Number of stops
- A noninteractive map displaying the route in question: clicking on this map allows you to navigate to a full view interactive map with the same route selected including its stops and technical objects
- List of stops (for each stop, a description, location, number of assets and status is displayed)

13.2.1.2 Searching for Routes

Clicking *See All* on the *Overview* page in the Routes section allows you to navigate to the *Routes List* page.

You can see the following information regarding each route on the list:

- Description
- ID
- Status
- Number of stops on route
- Due Date

You can search for routes from the *Routes List* by entering the route ID or description using the free text search field on top of the *Routes List*. The *Routes List* is filtered according to your search-related entries.

By default, routes are listed by the following priority: routes that are overdue are listed first, followed by routes that have due dates. Routes that have no due date are listed last.

Click *Filter* to sort routes by due date, description, and route ID. Routes can also be filtered according to Mobile Status (Received, Started, Hold, Transfer, and Completed).

> **Note**
>
> Even in offline mode, you can see a list of downloaded routes that are assigned to you.

13.2.2 Route Definition

A *route* is a path through a set of stops. Each stop is a set of technical objects. A technical object is either an equipment or a functional location in the SAP Service and Asset Manager application.

A route is built as a type of work order. Your work site differentiates a route and a standard work order on the back end. The technical objects that belong to each stop are defined using operations.

Each equipment or functional location belongs to one operation. If many technical objects share the same functional location, they all belong to the same stop. If the technical objects do not share a common functional location, each technical object is considered its own stop. A stop cannot have more than one functional location.

13.3 Working with Stops

Searching for Stops

You can search for a stop on your worklist using the free text search feature. To find a stop, enter a description for the stop to display related results.

> **Note**
>
> Even in offline mode, you can see a list of stops that belong to your assigned routes.

Stop Details Page

You can click *View Stop Details* to see additional information about a specific stop on a map.

Each stop shows you the following information:

- Description of stop, ID, Control Key, Work Center Plant, Work Center Type
- The location of the stop. If an address exists in the backend, it is displayed here as the location. If no address is maintained in the backend, then the equipment ID and the description of the location are concatenated.
- The location could also be a *functional location* (all equipment that is located at the same place is grouped into a functional location at one stop).

- The location could also be a *common functional location*. A common functional location encompasses locations as well as technical objects.

  > ✤ Example

  If at one stop, a functional location has two pieces of equipment and you need to capture data for the functional location as well as for the equipment, the backend service displays three assets for this stop.
- The location of the stop displayed on the *Stop Details Map* (you can select the map to navigate to a more detailed map displaying the selected stop and an information panel)
- A list of technical objects at a particular location that you need to capture data for. There is a section for equipment and another one for functional locations.

13.4 Working with Technical Objects

View Technical Objects

Technical objects are either equipment or functional locations. In the *Stop Details* page, you can see sections for equipment and for functional locations. These sections contain technical objects for which you collect data for on each stop. You can access this list even when in offline mode. Technical objects are only assigned to a selected stop.

Searching for Technical Objects

You can search for technical objects on your worklist. In the *Equipment* and *Functional Location* section, select *See All* to access the list of the technical objects belonging to one stop.

View Technical Object Details

From the *Technical Objects List* on the *Stop Detail*s page, you can select a technical object to navigate to the corresponding *Technical Object Details* page.

Taking Readings for a Technical Object

From the *Functional Location Details* page, click *Take Readings*. The *Field Data Capture* page displays. See the Measuring Points and Readings Overview [page 97] topic and subtopics underneath for more information.

If the technical objects have measuring points assigned to them, you can also click *Take Readings from Map* from the Map screen. The *Details* panel on the map includes the action *Take Readings?*.

14 Working with Meters

14.1 Meters Overview

Meter Management gives technicians access to SAP through a mobile device, with or without network access.

Using Meter Management, technicians can retrieve work orders assigned to them from the SAP system. Meter Management allows them to accomplish the following tasks:

- Meter installation
- Meter removal or replacement
- Meter disconnect or reconnect orders
- Periodic or aperiodic readings
- Meter repair orders
- Plant maintenance

Error Logs

When you sync to the back end after you modify a work order, you could get some sync errors. If errors occur:

1. Tap the hamburger menu icon at the top left of the screen to open the side navigation menu.
2. Tap *Errors* to open the Errors screen.
3. Select an error and tap *Fix*. You are taken to the *Edit* screen for that object, so you can fix the issue.

Fix each error in this manner and then resync. If you cannot fix an error or errors, you can contact customer support. See the Get Support for SAP Service and Asset Manager [page 17] topic for more information.

14.1.1 Work Order Detail Screen with Meter Management Component

The *Work Order* detail screen with the Meter Management component is similar to the *Work Order* detail screen in the base SAP Service and Asset Manager application, with a few key differences.

For an in-depth discussion of the Work Order detail screen, see the Work Order Detail Screen [page 50] topic. Here, only the differences between the two screens are discussed.

Meters Section

The *Meters* section provides you with a list of all of the meters and their details associated with the work order.

Connection Object Section

The connection object is the location, details, and the list of all of the meters associated with the work order.

Activity Section

The activity listed in the *Activity* section is the main task you are accomplishing when you start the work order. When you tap *Start Work Order* the *Edit Activity* screen automatically appears, to ensure that you have the proper activity selected for the meter work order.

> **Note**
>
> You cannot create a work order without meter actions. When you try to complete the work order without meter actions, a warning shows up.

See also the *Related Activities* subsection below the *Activity* main section. Tap in the related activities to view other activities associated with the work order.

14.2 Installing a Meter

Context

Work orders with a type of *SM01* are indicated in a bubble underneath the work order name. This indication tells you the meter is a new meter installation. Note that the Meter Management component must be installed with the base SAP Service and Asset Manager application to handle this type of work order.

Procedure

1. Tap on a work order.

   The *Work Order Detail* screen displays. If the work order has a meter available, and the meter type is *SM01*, you are expected to install the meter.
2. Tap the + icon and select *Install Meter* from the menu choices.

   The Meter Install screen displays.
3. Fill out all fields. Fields can change depending on selections. When finished, tap *Done*.

   A pop-up displays, asking if you want to take readings for the meter.
4. Tap *OK* to take a meter reading or *Skip* to skip the meter reading and install the meter without reading it. See the topic and subtopics in Measuring Points and Readings Overview [page 97] to learn how to take meter readings.

Results

Upon successfully installing the meter, a message appears saying *Registers Updated*. You are returned to the Work Order Detail screen. The *Meters* section displays the newly installed meter or meters.

Next Steps

You can now take readings on the installed meters as required by your work order or customer site.

14.3 Uninstalling a Meter

Context

Work orders with a type of *CU01* are indicated in a bubble underneath the work order name. This indication tells you the meter is a meter uninstallation. Note that the Meter Management component must be installed with the base SAP Service and Asset Manager application to handle this type of work order.

Procedure

1. Tap on a started work order. If the work order is not already started, start the work order.

   The *Work Order Detail* screen displays. If the work order has a meter available, and the meter type is *CU01*, you are expected to uninstall the meter.
2. Tap the meter in the *Meters* section you wish to uninstall

   The Meter Detail screen displays.
3. Tap *Uninstall* at the top right of the screen.

   The Meter Uninstall screen displays.
4. Fill out all fields. Fields can change depending on selections. When finished, tap *Done*.

   A pop-up displays, asking if you want to take readings for the meter.
5. Tap *OK* to take a meter reading or *Skip* to skip the meter reading and install the meter without reading it. See the topic and subtopics in Measuring Points and Readings Overview [page 97] to learn how to take meter readings.

Results

Upon successfully installing the meter, a message appears saying *Registers Updated*. You are returned to the Work Order Detail screen. The *Meters* section displays the newly installed meter or meters.

14.4 Replacing a Meter

Context

Work orders with a type of *RP01* are indicated in a bubble underneath the work order name. This indication tells you the work order is for a meter replacement. Note that the Meter Management component must be installed with the base SAP Service and Asset Manager application to handle this type of work order.

> **Note**
>
> When you replace a meter, it is the same as performing a removal and then an installation. Therefore, the screens you see are a combination of removing a meter and Installing a Meter [page 149].

Procedure

1. Tap on a started work order. If the work order is not started, start the work order.

   The *Work Order Detail* screen displays. If the work order has a meter available, and the meter type is *RP01*, you are expected to replace the meter.
2. Tap the meter in the *Meters* section you wish to replace. Note that the original, or initial meter, must display as *Installed* in the *Meters* section or you will not be able to perform a meter replacement on the meter.

   The Meter Detail screen displays.
3. Tap *Replace* at the top right of the screen.

   The Replace: Uninstall Meter screen displays.
4. Fill out all fields. Fields can change depending on selections. When finished, tap *Done*.

   A pop-up displays, asking if you want to take readings for the meter.
5. Tap *OK* to take a meter reading or *Skip* to skip the meter reading and install the meter without reading it. See the topic and subtopics in Measuring Points and Readings Overview [page 97] to learn how to take meter readings.
6. A pop-up displays, asking if you want to proceed to install the new meter. Tap *OK* to install the new meter or *Skip* to skip installation. See Installing a Meter [page 149] for instructions on how to install a new meter.

Results

Upon successfully installing the new meter, if you chose to install a new meter, a message appears saying *Registers Updated*. You are returned to the Meter Detail screen. When you return to the Work Order Detail screen, the *Meters* section displays the newly installed meter or meters as well as the uninstalled meter or meters.

14.5 Connecting and Disconnecting Meters

14.5.1 Reconnecting a Single Meter

Context

Work orders with a type of *RC01* are indicated in a bubble underneath the work order name. This indication tells you the meter can be a meter installation. Note that the Meter Management component must be installed with the base SAP Service and Asset Manager application to handle this type of work order.

Procedure

1. Tap on a work order. If the work order is not already started, start the work order.

   The *Edit Activity* screen displays if you started the work order
2. Most fields may be automatically selected and correctly filled out already. Tap in any fields that you need to correct and make new selections.
3. Tap *Done* after selecting all appropriate fields in the *Edit Activity*

   The *Work Order Detail* screen displays. If the work order has a meter available, and the meter type is *RC01*, you are expected to either uninstall, disconnect, reconnect the meter, or take a meter repair reading. The menu options available to you from the *Action* menu guides you through the appropriate task.
4. Tap the meter in the *Meters* section you wish to connect.

   The *Meter* detail screen displays. Here you have the choice to either *Take Readings* on all of the meters before connecting them, or you can *Connect* the meters without taking a final reading. To learn how to take meter readings, see the topic and subtopics in Measuring Points and Readings Overview [page 97].
5. Tap *Connect* at the top right of the screen.
6. Fill out all fields on the *Connect Meter* screens. Fields can change depending on selections. When finished, tap *Done*.

   A pop-up displays, asking if you want to take readings for the meter. To learn how to take meter readings, see the topic and subtopics in Measuring Points and Readings Overview [page 97].
7. Tap *OK* to take a meter reading or *Skip* to skip the meter reading and install the meter without reading it.

   Upon successfully installing the meter, a message appears saying *Registers Updated*. You are returned to the *Work Order* detail screen. The *Meters* section displays the newly installed meter or meters.

Results

Both the meter connect and the connect status on the activity are complete. To complete the work order, see Changing the Status of a Work Order [page 52] and subtopics.

14.5.2 Reconnecting All Meters

Context

Work orders with a type of *RC01* are indicated in a bubble underneath the work order name. This indication tells you the meter can be a meter installation. Note the Meter Management component must be installed with the base SAP Service and Asset Manager application to handle this type of work order.

Procedure

1. Tap on a work order. If the work order is not already started, start the work order.

   The *Edit Activity* screen displays if you started the work order
2. Most fields may be automatically selected and correctly filled out already. Tap in any fields that you need to correct and make new selections.
3. Tap *Done* after selecting all appropriate fields in the *Edit Activity*

   The *Work Order Detail* screen displays. If the work order has a meter available, and the meter type is *RC01*, you are expected to either uninstall, disconnect, reconnect the meter, or take a meter repair reading. The menu options available to you from the *Action* menu guides you through the appropriate task.
4. Tap the meter in the *Meters* section you wish to connect.

   The *Meter* detail screen displays.
5. Tap *Connect All* at the top right of the screen.

   The *Connect All Meters* screen appears, displaying a list of all meters you are connecting.
6. Tap *Done* to confirm the list of meters to connect.

   A message displays saying all meters are connected. You are then returned to the *Meter* detail screen.
7. If desired, tap on *Take Readings*, to take final readings for the meters. To learn how to take meter readings, see the topic and subtopics in Measuring Points and Readings Overview [page 97].

   Upon successfully installing the meters, a message appears saying *Registers Updated*. You are returned to the *Work Order* detail screen. The *Meters* section displays the newly installed meter or meters.

Results

Both the meter connect and the connect status on the activity are complete. To complete the work order, see Changing the Status of a Work Order [page 52] and subtopics.

14.5.3 Disconnecting a Single Meter

Context

Work orders with a type of *SM01* are indicated in a bubble underneath the work order name. This indication tells you the meter can be a meter uninstallation. Note that the Meter Management component must be installed with the base SAP Service and Asset Manager application to handle this type of work order.

Procedure

1. Tap on a work order. If the work order is not already started, start the work order.

   The *Edit Activity* screen displays if you started the work order
2. Most fields may be automatically selected and correctly filled out already. Tap in any fields that you need to correct and make new selections.

   The *Work Order Detail* screen displays. If the work order has a meter available, and the meter type is *SM01*, you are expected to either uninstall, disconnect, reconnect the meter, or take a meter repair reading. The menu options available to you from the *Action* menu guides you through the appropriate task.
3. Tap the meter in the *Meters* section you wish to disconnect.

   The *Meter* detail screen displays. Here you have the choice to either *Take Readings* on all of the meters before disconnecting them, or you can *Disconnect* the meters without taking a final reading. To learn how to take meter readings, see the topic and subtopics in Measuring Points and Readings Overview [page 97].
4. Tap *Disconnect* at the top right of the screen.
5. Fill out all fields on the *Disconnect Meter* screens. Fields can change depending on selections. When finished, tap *Done*.

   A pop-up displays, asking if you want to take readings for the meter. To learn how to take meter readings, see the topic and subtopics in Measuring Points and Readings Overview [page 97].
6. Tap *OK* to take a meter reading or *Skip* to skip the meter reading and install the meter without reading it.

   Upon successfully uninstalling the meter, a message appears saying *Registers Updated*. You are returned to the *Work Order* detail screen. The *Meters* section displays the newly installed meter or meters.

Results

Both the meter disconnect and the disconnect status on the activity are complete. To complete the work order, see Changing the Status of a Work Order [page 52] and subtopics.

14.5.4 Disconnecting All Meters

Context

Work orders with a type of *SM01* are indicated in a bubble underneath the work order name. This indication tells you the meter can be a meter uninstallation. Note the Meter Management component must be installed with the base SAP Service and Asset Manager application to handle this type of work order.

Procedure

1. Tap on a work order. If the work order is not already started, start the work order.

   The *Edit Activity* screen displays if you started the work order
2. Most fields may be automatically selected and correctly filled out already. Tap in any fields that you need to correct and make new selections.

   The *Work Order Detail* screen displays. If the work order has a meter available, and the meter type is *SM01*, you are expected to either uninstall, disconnect, reconnect the meter, or take a meter repair reading. The menu options available to you from the *Action* menu guides you through the appropriate task.
3. Tap the meter in the *Meters* section you wish to disconnect.

   The *Meter* detail screen displays.
4. Tap *Disconnect All* at the top right of the screen.

   The *Disconnect All Meters* screen appears, displaying a list of all meters you are disconnecting.
5. Tap *Done* to confirm the list of meters to disconnect.

   A message displays saying all meters are disconnected. You are then returned to the *Meter* detail screen.
6. If desired, tap on *Take Readings*, to take final readings for the meters. To learn how to take meter readings, see the topic and subtopics in Measuring Points and Readings Overview [page 97].

   Upon successfully uninstalling the meters, a message appears saying *Registers Updated*. You are returned to the *Work Order* detail screen. The *Meters* section displays the newly installed meter or meters.

Results

Both the meter disconnect and the disconnect status on the activity are complete. To complete the work order, see Changing the Status of a Work Order [page 52] and subtopics.

14.6 Taking a Meter Repair Reading

Meter repair readings are meter readings that are not on a regular schedule. They are entered manually in the back end by an administrator and attached to a work order.

Context

Work orders with a type of *SM01* are indicated in a bubble underneath the work order name. This indication tells you the meter is a meter for you to disconnect, reconnect, or take a meter repair reading. The menu options available to you from the *Action* menu will guide you through the appropriate task. Note that the Meter Management component must be installed with the base SAP Service and Asset Manager application to handle this type of work order.

Procedure

1. Tap on a started work order. If the work order is not already started, start the work order.

   The Work Order Detail screen displays.
2. Look in the *Activity* section of the Work Order Detail screen. Here you will find details on the meters in the work order. A *meter repair* meter that needs a reading is a meter that is already disconnected.
3. Tap on the meter in the *Meters* section you wish to read.

   The Meter Detail screen displays.
4. Tap either *Take Readings* or *Take Reading*, depending on which menu item displays on the top right of your screen.

   The Take Reading or Take Readings screen displays.
5. To take a single meter reading or multiple meter readings, see the following procedures:
   - Taking All Measuring Point Readings [page 99]
   - Taking a Single Measuring Point Reading [page 100]

Results

In the *Current Reading* section, the new measurement point reading information appears. The previous measurement point reading now appears in the *Previous Reading* section. Be sure to *Sync* your mobile client to send the measurement point reading information to the back end.

14.7 Taking an Aperiodic Meter Reading

Aperiodic readings are meter readings that are not on a regular schedule. They are entered manually in the back end by an administrator and attached to a work order.

Context

Work orders with a type of *MR01* are indicated in a bubble underneath the work order name. This indication tells you the meter is an aperiodic meter. Note that the Meter Management component must be installed with the base SAP Service and Asset Manager application to handle this type of work order.

Procedure

1. Tap on a started work order. If the work order is not already started, start the work order.

   The Work Order Detail screen displays.
2. Tap on the meter in the *Meters* section you wish to read.

   The Meter Detail screen displays.
3. Tap either *Take Readings* or *Take Reading*, depending on which menu item displays on the top right of your screen.

   The Take Reading or Take Readings screen displays.
4. To take a single meter reading or multiple meter readings, see the following procedures:
   - Taking All Measuring Point Readings [page 99]
   - Taking a Single Measuring Point Reading [page 100]

Results

In the *Current Reading* section, the new measurement point reading information appears. The previous measurement point reading now appears in the *Previous Reading* section. Be sure to *Sync* your mobile client to send the measurement point reading information to the back end.

14.8 Taking a Periodic Meter Reading

Periodic readings are meter readings that are on a regular schedule for billing purposes.

Context

Work orders with a type of *MR01* are indicated in a bubble underneath the work order name. This indication tells you the meter is n periodic meter. Note that the Meter Management component must be installed with the base SAP Service and Asset Manager application to handle this type of work order.

Procedure

1. Tap on a started work order. If the work order is not already started, start the work order.

   The *Work Order* detail screen displays.
2. Tap on the meter in the *Meters* section you wish to read.

   The Meter Detail screen displays.
3. Tap either *Take Readings* or *Take Reading*, depending on which menu item displays on the top right of your screen.

   The Take Reading or Take Readings screen displays.
4. To take a single meter reading or multiple meter readings, see the following procedures:
   - Taking All Measuring Point Readings [page 99]
   - Taking a Single Measuring Point Reading [page 100]

Results

In the *Current Reading* section, the new measurement point reading information appears. The previous measurement point reading now appears in the *Previous Reading* section. Be sure to *Sync* your mobile client to send the measurement point reading information to the back end.

15 Working with Quality Management

The Quality Management (QM) component supports tasks associated with quality planning, quality inspection, and quality control. In addition, it controls the creation of quality certificates and manages problems with the help of quality notifications.

The QM component in SAP Service and Asset Manager uses the following major features:

- Calibration Orders [page 159]
- Quality Management Notifications [page 160]
- Inspection Lots [page 160]
- Results Recording [page 160]

Filtering Quality Management Notifications

You can filter QM notifications using the following criteria:

- Mandatory or Optional
- Out of range
- Empty
- Operations
- Inspection point

For detailed information on how to use the filter function, see the Filtering Objects [page 27] topic.

15.1 Calibration Orders

Calibration orders are used to determine whether a piece of test, or calibration, equipment fulfills the defined performance criteria.

Work with calibration orders in the same way that you work with a maintenance activity operation. See the How to Work with an Operation or Suboperation Maintenance Activity [page 58] topic for more details.

15.2 Quality Management Notifications

A quality notification contains functions for capturing and processing problems or defects that are identified during inspection. Use the quality notifications to analyze recorded defects and perform root cause analysis of problems.

QM notifications are integrated with SAP Service and Asset Manager as follows:

- Display QM type notifications on the mobile device
- Create QM notifications at the inspection lot level
- Create QM notification items to record defects noted in inspections
- Maintain the association of notifications and notification items with the characteristics

15.3 Inspection Lots and Results Recording

In plant maintenance, an inspection lot is a request to inspect one or more pieces of equipment or functional locations.

In a production process, it is sometimes necessary to carry out inspections to ensure the quality of a product. An inspection lot documents a request for an inspection. Inspection characteristics are assigned to the inspection lot. An inspection characteristic defines what needs to be inspected. A distinction is made between qualitative characteristics and quantitative characteristics.

In Quality Management, an inspection lot is created for a QM order on the back end. Characteristics are assigned to individual operations in the order. The characteristics define the inspection requirements. You are then assigned to the QM order and associated inspection lot in SAP Service and Asset Manager.

The *KPI* section is read-only and displays the characteristic points and inspection points included in the inspection lot. You can see the number of read and unread inspection points and characteristics. You are tasked with recording each inspection characteristic and inspection point. These inspection characteristic and inspection point recordings are then stored in the inspection lot.

The inspection lot *Details* section shows you details about the entire inspection lot.

The *Operations* section helps you perform and complete your job. You can tap on any individual QM operation for more information, such as documents or more people to contact, if needed, for that operation. QM operations work in the same way as work order operations. See the How to Work with an Operation or Suboperation Maintenance Activity [page 58] topic and sub-topics for general information.

Tap the *Set Usage* menu choice at the top of the screen to record your usage decision. See the Setting a Usage Decision on an Inspection Lot [page 165] procedure for more information. Note that depending on your permissions on the SAP Service and Asset Manager client, you may not be able to record a usage decision. Talk to your administrator if you need this ability.

15.3.1 Recording All Inspection Points and Characteristics Results on an Inspection Lot

To complete a QM operation, all open characteristics and inspection points must be read, measured, or valuated.

Context

An **inspection point** is an identifiable record of inspection results that is assigned to a work or inspection operation. Several inspection points can be assigned to an inspection operation. An example of an inspection point is a physical sample, a piece of equipment, or a functional location.

An **inspection characteristic** defines what needs to be inspected. Characteristics define the inspection requirements for an inspection point. An example of a characteristic is temperature, pressure, length, or width.

> ⓘ Note
>
> You can only record inspection points or characteristics results if the work order associated with the inspection lot is set to *Started*.

Procedure

1. From a main QM *Work Order* screen, tap on the *Inspection Lot*.

   The *Inspection Lot* screen displays.
2. Tap on *Record Results* at the bottom of the screen.

   The *Record Results* screen displays, with a list of all inspection points and their associated characteristics.
3. You can either record results individually by tapping on *Calculate* for each reading, or you can select *Validate All* to validate all existing readings.

   If you select *Calculate*, continue to the next step.

   If you select *Validate All*, continue to the Valuating Inspection Lots [page 164] procedure.
4. Enter the reading for the characteristic or result. Depending on the type of characteristic or result it is, you could enter a numerical value, select a status from a drop-down menu, or select a status through a button.

   > ⓘ Note
   >
   > If you're unsure how to take a specific reading, tap the *Inspection Method* button. See the Inspection Method Information [page 163] topic for more information.
5. When finished recording all results, tap *Done*.

Next Steps

Continue to Valuating Inspection Lots [page 164].

15.3.2 Recording Results for a Single Inspection Point

To complete a QM operation, all open characteristics and inspection points must be read, measured, or valuated.

Context

An **inspection point** is an identifiable record of inspection results that is assigned to a work or inspection operation. Several inspection points can be assigned to an inspection operation. An example of an inspection point is a physical sample, a piece of equipment, or a functional location.

An **inspection characteristic** defines what needs to be inspected. Characteristics define the inspection requirements for an inspection point. An example of a characteristic is temperature, pressure, length, or width.

> ⓘ Note
>
> You can only record inspection points or characteristics results if the work order associated with the inspection lot is set to *Started*.

Procedure

1. From a main QM *Work Order* screen, tap on the *Inspection Lot*.

   The *Inspection Lot* screen displays.
2. Tap on the *Inspection Point* for which you want to record results.

   The *Inspection Point* screen displays.
3. Tap on *Record Results* at the top right of the screen.

   The *Record Results* screen displays, with a list of characteristics associated with the inspection point. Record characteristic results by tapping on each characteristic, then tapping
4. *Calculate*.
5. ReEnter the reading for the characteristic. Depending on the type of characteristic it is, you could enter a numerical value, select a status from a drop-down menu, or select a status through a button.

   > ⓘ Note
   >
   > If you're unsure how to take a specific reading, tap the *Inspection Method* button. See the Inspection Method Information [page 163] topic for more information.

6. When finished recording all results, tap *Valuate*.

Next Steps

Continue to Valuating Inspection Lots [page 164].

15.3.3 Inspection Method Information

Inspection methods describe how to carry out an inspection for an inspection characteristic.

Accessing Inspection Method Information Through the Inspection Lot Screen

1. On the main *Inspection Lot* screen, tap the operation for which you need to take inspection point readings.
2. From the *Operation* screen, tap the inspection point to read.
3. From the *Inspection Point* screen, tap the desired *Characteristic*.
4. From that characteristic, tap the *Inspection Method* section.

The *Inspection Method* screen for a specific characteristic can contain a *Note* with information or directions on how to read the characteristic. It can also contain downloadable documents with more detailed information. Tap on *Open* to open the document.

Accessing Inspection Method Information While Recording Results

1. On the main *Inspection Lot* screen, tap the operation for which you need to take inspection point readings.
2. Tap *Record Results* at the bottom of the screen

All characteristics and inspection points display on the *Record Results* screen. Each item on the list has an *Inspection Method* button. Tap the button to access the *Inspection Method* screen.

The *Inspection Method* screen for a specific characteristic can contain a *Note* with information or directions on how to read the characteristic. It can also contain downloadable documents with more detailed information. Tap on *Open* to open the document.

15.3.4 Valuating Inspection Lots

When you valuate inspection characteristics or partial samples, you determine whether the predefined quality requirements have been met.

Valuation results provide the basis for making the usage decision, and they're used to automatically determine the sample scope for future inspections. A successful valuation is a prerequisite for closing a characteristic.

> ⓘ Note
>
> Your site administrator determines if you're authorized to valuate characteristics and inspection lots. If you aren't able to access the valuation option, but need to valuate, contact your administrator.

Valuating Inspection Lots

To valuate an inspection lot:

1. Follow the procedure in Recording All Inspection Points and Characteristics Results on an Inspection Lot [page 161]. When you tap *Done*, the *Valuation* screen appears.
2. If desired, tap on *Review* under each inspection point. When the *Point <X>* screen appears, you can review your characteristic readings. Tap the back arrow to return to the *Valuation* screen when finished.
3. When satisfied with your review, tap *Done*. A success message appears stating that the inspection lot is valuated. If you receive an error, read the error to fix the issue.

Valuating an Inspection Point

To valuate an inspection point:

1. Follow the procedure in Recording Results for a Single Inspection Point [page 162].
2. Tap *Valuate* at the bottom of the screen. The *Valuation* screen for the inspection point appears.
3. If desired, tap on *Review* for the inspection point. When the *Point <X>* screen appears, you can review your characteristic readings. Tap the back arrow to return to the *Valuation* screen when finished.
4. When satisfied with your review, tap *Done*. A success message appears stating that the inspection point is valuated. If you receive an error, read the error to fix the issue.

Post-Requisites

Continue to Setting a Usage Decision on an Inspection Lot [page 165].

15.3.5 Setting a Usage Decision on an Inspection Lot

The usage decision for an inspection lot confirms that all physical samples have been valuated and the inspection has been completed. It also specifies whether the goods in the inspection lot have been accepted or rejected for use.

Prerequisites

To set a usage decision on an inspection lot, you must complete the following tasks. Choose to record all inspection results in a batch process, or record individual inspection points one at a time:

- Recording Results for a Single Inspection Point [page 162]
- Recording All Inspection Points and Characteristics Results on an Inspection Lot [page 161]

The work order associated with the inspection lot must also be in the *Started* state.

Context

If an inspection usage decision exists in the back end for the inspection lot, you won't be allowed to enter a new usage decision. If you haven't yet synced your device to the back end, you can change your local usage decision. Depending on your permissions on the SAP Service and Asset Manager client, you may not be able to record a usage decision. Talk to your administrator if you need this ability.

Procedure

1. From the main *Work Order* screen, select the *Inspection Lot* associated with the work order.

   The *Inspection Lot* detail screen displays.
2. Tap *Set Usage* at the top right of the screen.

   The *Set Usage* decision screen displays.
3. Select your usage decision code from the list picker and click *Done*.

   The usage decision for the inspection lot is recorded.

Next Steps

You can now set the operation in the work order to *Complete*. If a signature is required, see the Adding a Signature [page 71] topic.

15.4 Adding a Local Quality Management Notification

QM notifications capture problems or defects that are identified during an inspection.

QM notifications function in the same way as general notifications. For general information on adding a local notification, see the Adding a Notification [page 107] topic.

When you create a QM notification, select `<Type>` *QM - Mobile Quality Issue*.

Once you create a QM notification, it is visible on the *Notification* detail screen. Perform a sync to send your local notification to the back end.

16 Working with Defense and Security Features

> **Note**
>
> All the functions described in this document are available only if the DEFENSE_INTEGRATION feature is enabled for SAP Service and Asset Manager. For more information about how to configure this feature, see Defense and Security Features Configuration.

SAP Service and Asset Manager supports the following features for the Defense and Security industry:

- Flight order
- Support defense-related properties in Materials
  - NATO Stock Number (NSN)
  - Manufacturer Part Number (MPN)
  - Long Manufacturer Part Number (LMPN)
- Condition codes
- Master and critical equipment
- Operational and technical status
- Additional defense and security fields on supply docs and material master
- Support edge mobile services

> **Note**
>
> Unfold below sections for more information.

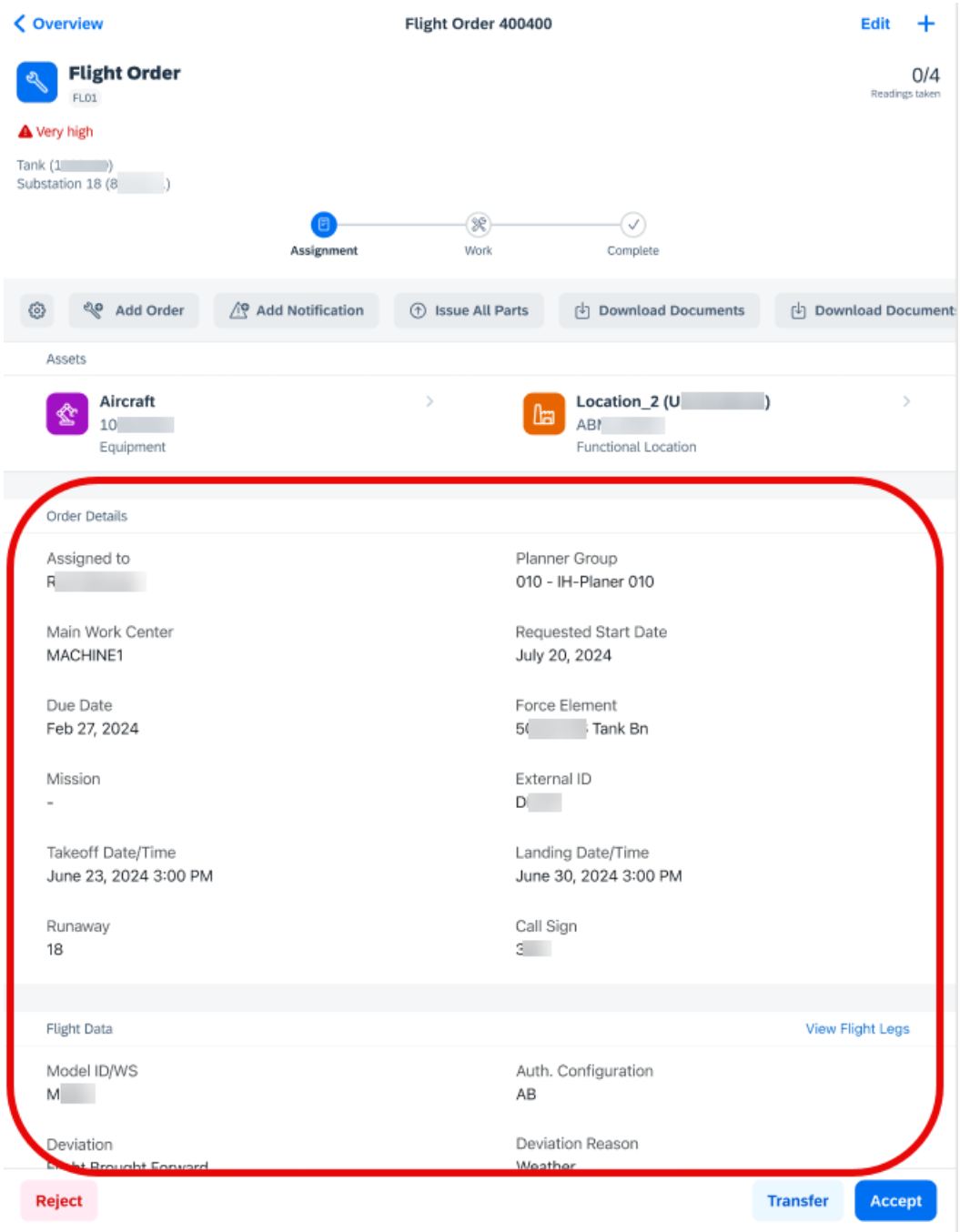
Supported Personas

This feature is applicable for the following persona(s):

Maintenance Technician (Pro)

Flight Order

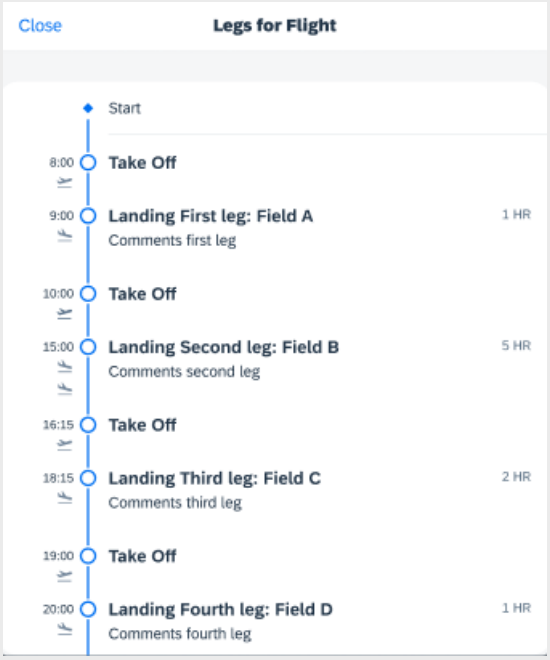
Compared to general Work Orders [page 50], a Flight Order details screen displays additional flight-specific data (see image below). You can quickly filter for the list of Flight Orders from the Work Order list screen, by tapping the *Flight Order* quick action button.



- Mission
- Takeoff Date/Time
- Runaway
- Force Element
- External ID
- Landing Date/Time
- Call sign
- Flight Data
  - Mode

- Deviation
- Deviation reason

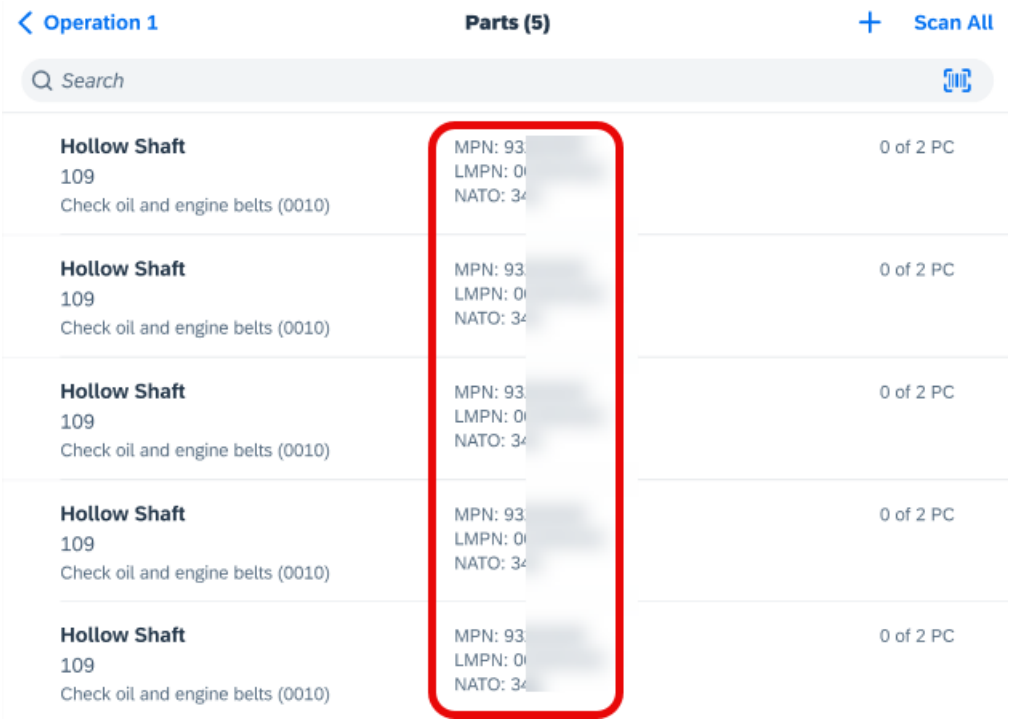
> **Note**
>
> In the *Flight Data* section you can also check the legs for the flight, by tapping *View Flight Legs*.



Support defense-related properties in Materials

When working with Parts [page 65] and Materials [page 93], the following additional defense properties are displayed on list and details pages:

- NATO Stock Number (NSN
- Manufacturer Part Number (MPN)
- Long Manufacturer Part Number (LMPN)



> **Note**
>
> - On the List view you can search and scan by NSN, MPN and LMPN properties.
> - On Add Part screen [page 66], you can search and scan materials (online and offline) by NSN, MPN and LMPN properties.

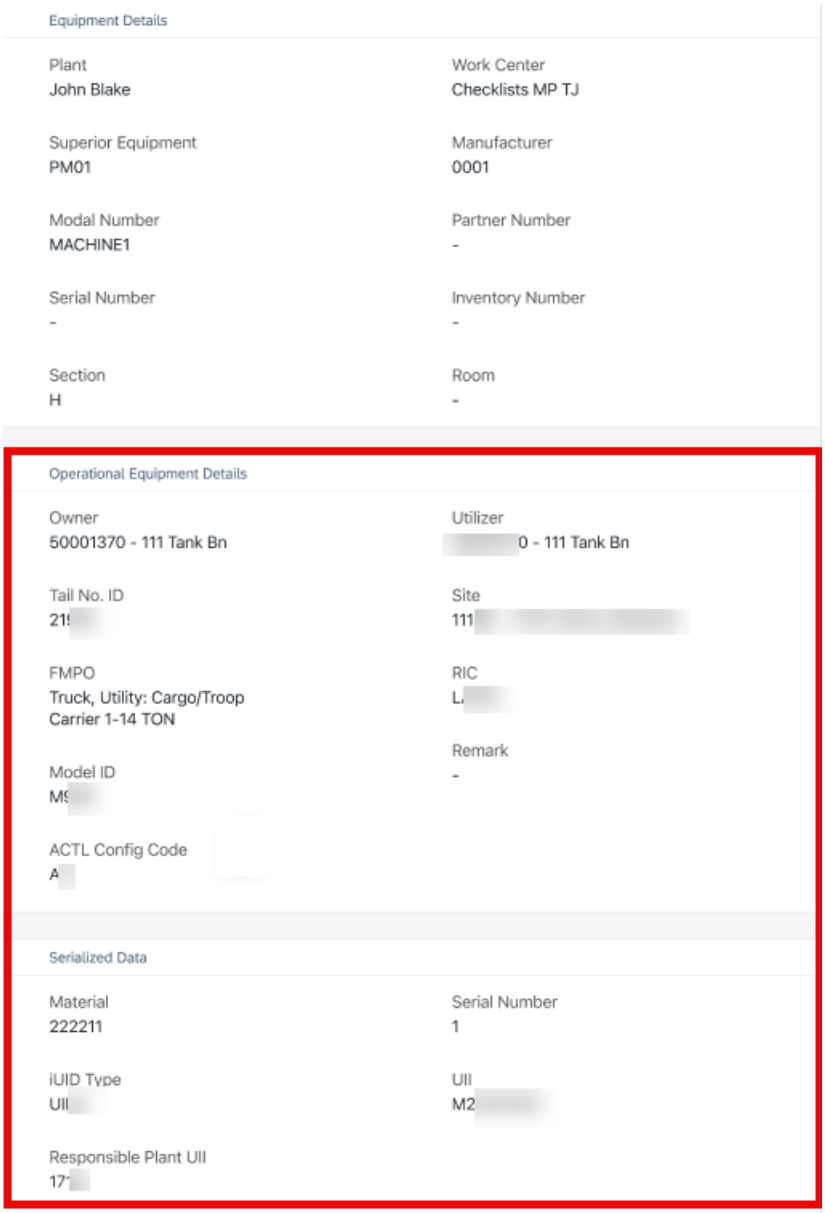
Support defense-related properties in Equipments

When working with Equipments [page 85], the following additional defense properties are available on the Equipment's detail page:

- Serialized Data (if applicable for the Equipment)
  - Material
  - Serial number
  - iUID Type
  - UII
  - Responsible Plant UII

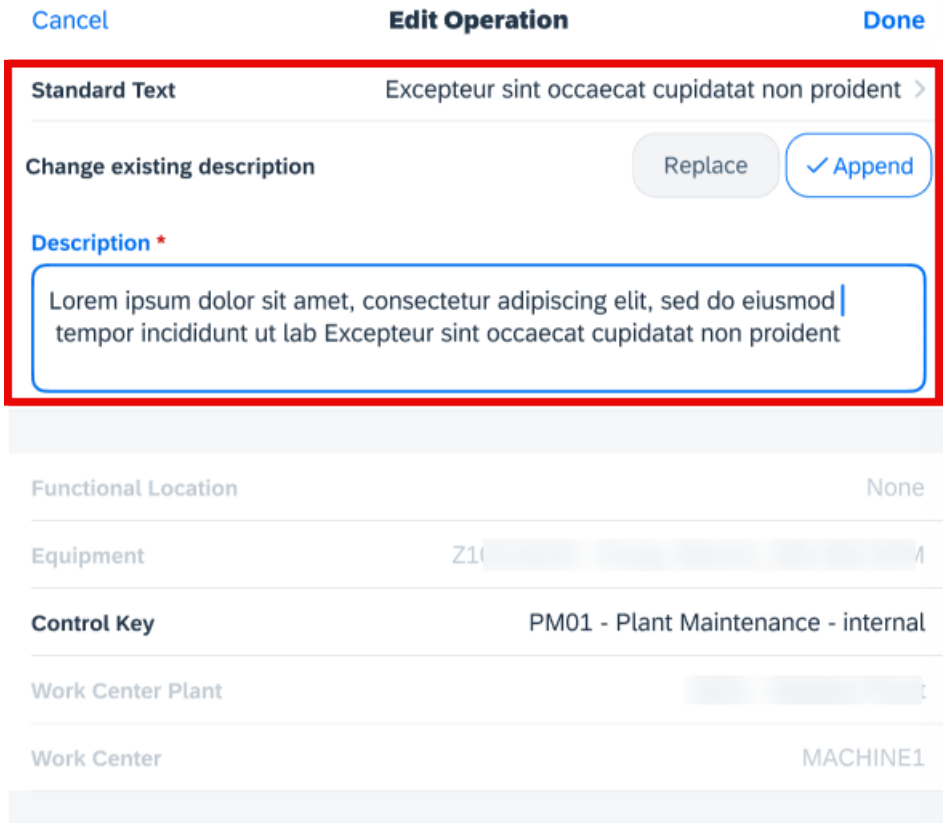
  > **Note**
  >
  > When you are issuing or returning a Part, you can see and search or scan by the UIID (if available).
- Master Data
  - Identification and Localization
    - Owner

    - Utilizer
    - Tail No.ID
    - Site
- Classification
    - FMPO
    - RIC
    - Model ID
- Status
    - ACTL Config Code (classification value)
    - Remark



Standard Text support for Operation and Suboperation

When creating or editing an Operation or Suboperation [page 58], if *Standard Text* is available, you can select one to automatically fill the *Description* and *Notes* fields for the object.



> **Note**
>
> When editing an Operation or Suboperation, you can choose to *Replace* or *Append* to the existing text.

17 Working with Purchase Requisition

The SAP Service and Asset Manager app allows you to request a purchasing organization to procure a certain list of materials or services, and create a purchase requisition.

> **Note**
>
> By default, purchase requisitions created by the user within two weeks are downloaded, you can use the Searching for Objects [page 27] function to view other purchase orders.

A purchase requisition is an internal document and remains within the organization, and it is the subject for approval. This approval process, though, is an internal action and the authorization check is performed in the back end. Once a purchase requisition is approved, it is converted into a purchase order.

> **Note**
>
> If a purchase requisition has already been approved, the purchase requisition document can only be changed to a limited extent.

Related Information

Performing a Purchase Requisition Count [page 173]
Creating a Purchase Requisition [page 174]
Adding Another Item [page 175]
Discarding a Purchase Requisition [page 175]

17.1 Performing a Purchase Requisition Count

Context

You can download a purchase requisition document created in the SAP backend and perform counts on it.

Procedure

1. On the main *Overview* page, enter or scan the *Purchase Requisition* document number in the search bar, or scroll and navigate to a previously downloaded document and tap on it to go to the document details page.

   The document details page has the *Header* section and the *Items* tab.
2. On the *Purchase Requisition* screen, on the *Items* tab, select the item you want to view.

   On the *Item* details page, you can view item and delivery address details.

17.2 Creating a Purchase Requisition

Context

To add a new purchase requisition object, use the *Add Purchase Requisition* option.

Procedure

1. On the main *Overview* page, tap the plus sign icon, and click *Add Purchase Requisition* from the choices. Or, from the side navigation bar, choose *Add Purchase Requisition*.

   The *Create Purchase Requisition* document appears.
2. In the *Document Type* section of the document specify document type, purchasing organization, purchasing group, and requisition date. The credentials of the person on whose behalf the purchase requisition is made will be filled in automatically.
3. In the *Plant* section of the document fill in all the required fields such as the plant, storage location and material number. Add description and storage bin, if any.
4. Specify the quantity, unit, batch if applicable, valuation price and price unit. Select delivery date, desired supplier and fixed vendor.
5. Add header note and item note, if any. Tap *Create*.

   A new *Purchase Requisition* will be created and added to the items list. Tap *Done*.

Next Steps

Perform a transmit to the SAP back end.

17.2.1 Adding Another Item

Context

To add an additional item to your recently created purchase requisition object, use the *Add Another Item* option.

Procedure

1. From the *Purchase Requisition* list, tap *Add Another Item*.

   The *Create Purchase Requisition* document appears.
2. Fill in or edit all the required details such as document type, purchasing organization and group, plant, storage location and bin, material number, quantity, unit, batch, valuation price, desired supplier, fixed vendor, requisition and delivery date. Tap *Create*.

   The additional item is added to your recently created purchase requisition.

Next Steps

Perform a transmit to the SAP back end.

17.3 Discarding a Purchase Requisition

Context

To remove a purchase requisition object from your client without changing the back end, use the *Discard* option.

> **Note**
>
> The *Discard* option only removes the object from your mobile device.

Procedure

1. Use the *Search* box from the main list to find the object you want to remove and select the object. Or, from the *Purchase Requisition* list select the desired object and tap it.

   You can always use the *Recent* screen to search for a newly created object.
2. Tap *Discard* and confirm the discard of the object. If you mistakenly discard an object, you can always download the information back to your device from the back end again.

   The required object is removed from your client.

18 Working with Smartforms

18.1 Smartforms Overview

SAP Service and Asset Manager supports FSM Smartforms that allow planning board administrators to efficiently gather technician activity information in an organized way. Planning board administrators can assign Smartform instances to activities and require technicians to fill out the Smartform instance before completing the activity. Smartform instances can be associated with the following objects:

- Equipments [page 85]
- Functional Locations [page 133]
- Service Orders
- Service Order Items

As a mobile user, you can:

- Fill out Smartform instances while working on your assigned activities. Once synchronised, all changes to the fields and attachments in the Smartform instance will be reflected in the FSM planning board cloud.
- **Create**, **edit** and **delete** new Smartform instances from the supported object's details screen. You can create new Smartform instances from templates, if available.

> ⓘ Note
>
> - Not all fields within Smartforms are supported in the same way. Smartforms must be preconfigured and customized by administrators before users can fill in all the fields.
> - For more information about configuring this feature, see FSM Smartforms Configuration.

Supported Personas

This feature is supported by the following personas:

Maintenance Technician (Pro)
Field Service Technician (Standard)
Field Service Technician (Pro)

Smartform Statuses

The following statuses are available for the Smartforms in the app:

Status	Description
Open	If you have created but have not yet started filling out a Smartform instance, it will have an open status. But after you start filling it, the status of that Smartform will change to started. You can see an open or started Smartform in the list of all Smartforms that is accessible from the side navigation bar.
Started	Once you have started filling out an instance of a Smartform, you can save it as a draft to return to fill out the fields later, close it without saving, or submit it after you're finished.
Completed	Once you have filled in all the required fields, you can submit the Smartform, which means that it will be completed, and with it you can submit and close the operation if the rest of the required data is provided.

18.2 Adding Smartforms to Objects

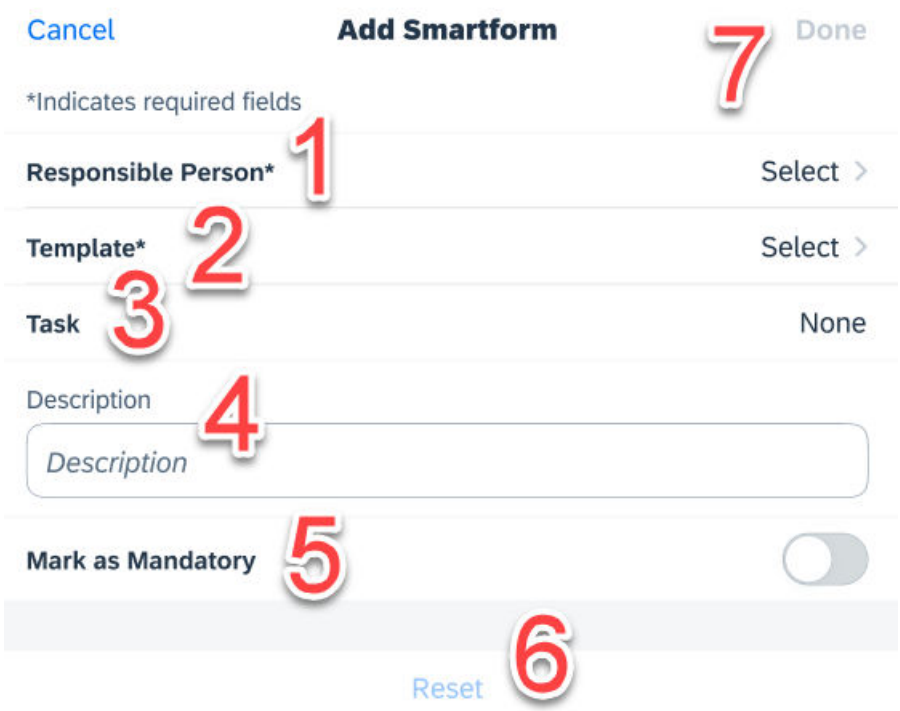
Technicians can not only work with pre-attached Smartforms, but also add new ones to existing operations. They can create Smartforms from Templates and attach to the objects listed in Smartforms Overview [page 177].

> **Note**
>
> The FSM Smartform Template feature is:
>
> - Applicable for both Customer Service and SAP S/4HANA back end systems.
> - Part of Field Service Technician Scheduling, no additional configuration steps are required.
> - Supported by the Maintenance Technician (Pro) persona, if it already has Field Service Management integration configured.

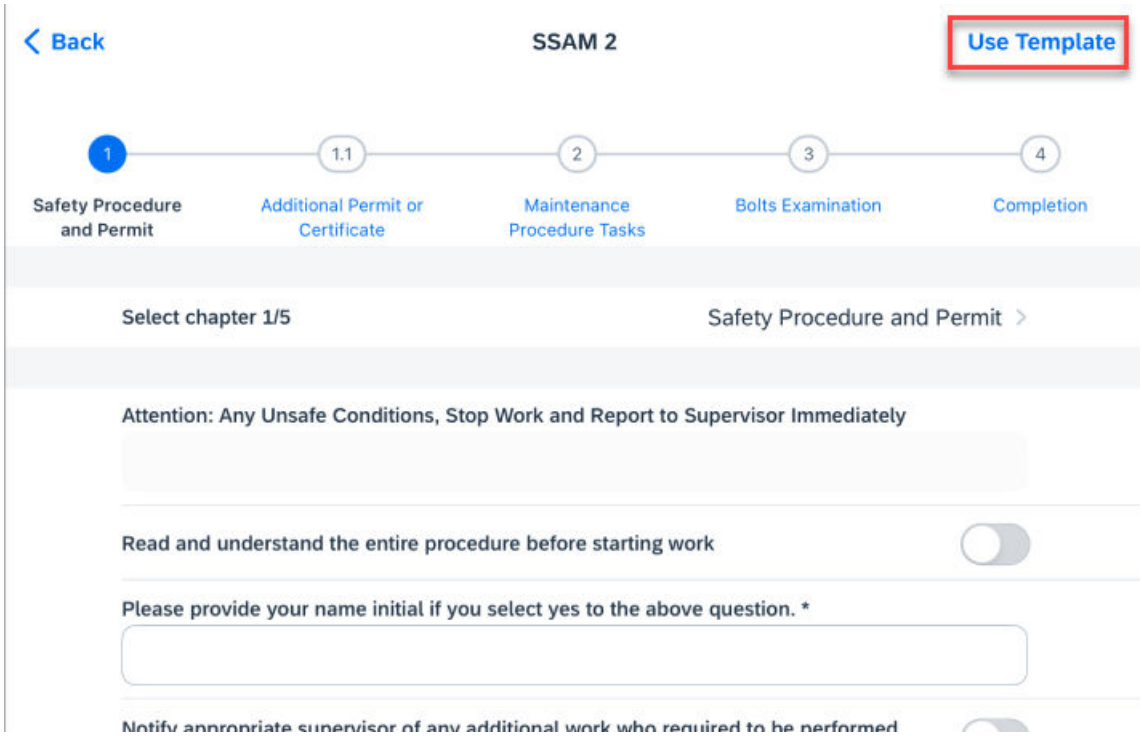
Using the feature

To create and attach a new Smartform on the object's detail screen, tap either of the following:

- *Add Smartform* Quick Action Button
- *Add* button on the top-right of the detail screen
- *Add* button in the *Smartforms* section header



1. *Responsible Person*: Select the employee responsible to complete the Smartform.
2. *Template*: Select a template that serves as the basis for creating the new Smartform.
3. *Task*: You can add a related Task to the Smartform. For more information about Tasks, see Adding a Task [page 109].
4. *Description*: You can add a description according to your preference.
5. *Mark as Mandatory*: You can mark the Smartform as mandatory to complete for the object it is attached to.
6. *Reset*: You can reset all fields.
7. When all set, tap *Done*.
8. Tap *Use Template* to create the new Smartform instance.



9. Once created, you can start working on the Smartform.

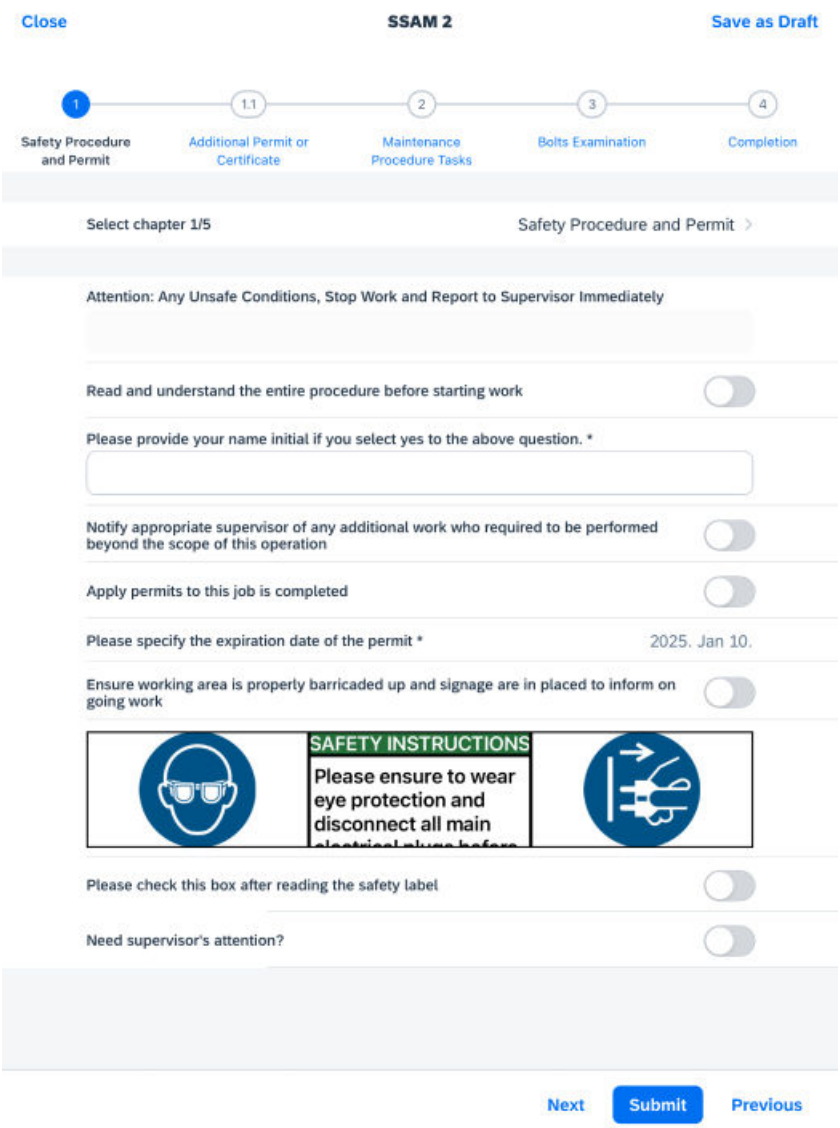
> **Note**
>
> While working on the Smartform, you can save it as a draft as well as delete it from the related object's detail page.

18.3 Accessing and Working with Smartforms

If you want to display and work with Smartforms, you can access them either from:

- The side navigation bar within the Smartform menu. Here, you can search for the desired Smartforms and basically see all available Smartforms, as each of them refers to one object.
- The detail screen of the object, where you can see all the related Smartforms.

Displaying, Saving, Closing and Submitting Smartforms



- Each Smartform contains different steps and fields like attachments, signatures, toggles, and input fields.
- To scroll through the steps area, use the *Progress Tracker Control* feature, tap and fill in a particular step. For more information, refer to the Progress Tracker Control [page 182] section.

> ### Note
>
> Smartforms can contain mandatory and optional fields. Mandatory fields are indicated with asterisks, and you must complete them to submit the Smartform.

- Tap the *Save as Draft* button to save a copy of the Smartform instance if the Smartform is partially completed. You can save it at any time while filling out the fields. The next time you open the Smartform, all the data will be preloaded for you and you can edit it.
- Tap the *Close* button to close the entire instance without saving and to return to the Smartforms list page/Object's detail page.

When you get to the last step and the entire Smartform is completed, click *Submit* to send an instance of the Smartform. When the Smartform is successfully completed, the status of that Smartform will change to completed. You can see this completed Smartform in the list of all Smartforms.

18.4 Progress Tracker Control

The *Progress Tracker Control* feature allows the user to interact within the smartform and navigate between the steps.

The user can navigate between the steps also using either the progress tracker or the *Next* and *Previous* buttons. The *Next* and *Previous* buttons allow the user to take steps forward or backward, while the progress tracker allows the user to navigate to any specific step.

The progress tracker control shows the current status of each smartform step, mandatory steps are highlighted with an asterisk symbol. If the step is completed, a stick indicator is displayed.

> ⓘ Note
>
> If the user clicks the *Next* button without filling in all the mandatory fields, he will remain on the same page, all the required fields will be highlighted and the inline errors and error message will be shown.

If the user has filled in all required fields, he can submit the smartform, which means it will be completed, and he can close the *Operation* detail screen within the service order if all required data is provided.

> ⓘ Note
>
> Depending on your screen configuration, you may only see a portion of the following statuses and steps. If there is only one step in the smartform, there will be no progress tracker at the top of the instance. Contact your administrator for more information.

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