



**PUBLIC**

SAP Work Manager

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# **SAP Work Manager User Guide - Phone**

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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/viewer/p/SAP\\_WORK\\_MANAGER](https://help.sap.com/viewer/p/SAP_WORK_MANAGER).

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

Document Version	Release Date	Description of Changes
1.0	JUL 2021	Original release of the <i>SAP Work Manager User Guide - Phone</i> , version 6.6.
1.1	OCT 2021	Changed problematic language (ex: user master to user data)

# 1 About This Guide

This user guide is provided for end users of the SAP Work Manager application. The contents of this guide reflect the behavior and functionality of the SAP Work Manager application as provided by SAP through the software installers for the application. SAP Work Manager was developed using and deployed on the SAP Mobile Platform.

One of the benefits of this platform is the ability to configure many aspects of the SAP Work Manager application's behavior. For this reason, it is likely that differences will exist between the information documented in this guide and the final behavior of the application for a given implementation. In some implementations, the differences between this guide and the actual configuration of the application will be significant.

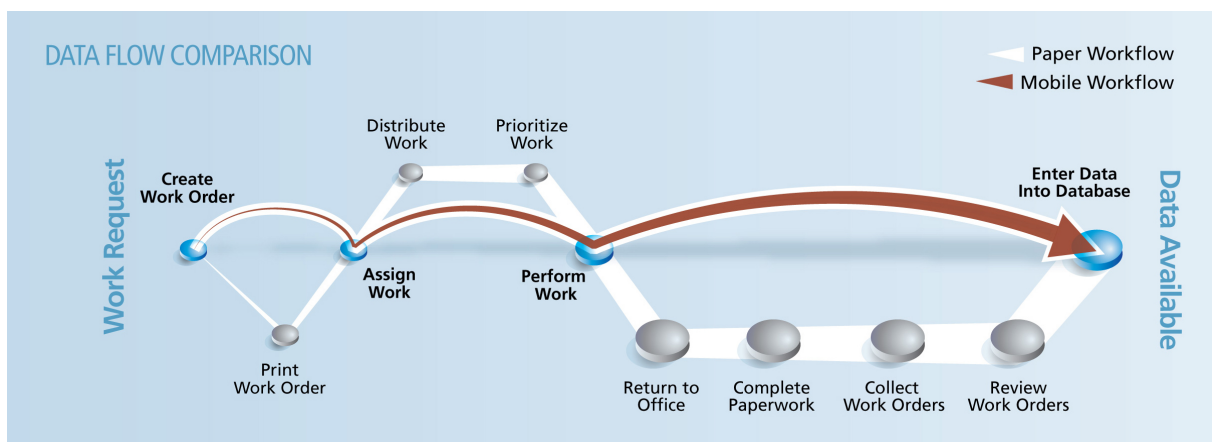
## 2 SAP Work Manager Overview

SAP Work Manager is designed to automate workflow and improve service with mobile work orders, notifications, and time management.

SAP Work Manager connects mobile employees with the data stored in an SAP system so they can better manage work and service requests.

### Creating a Paperless Workflow

SAP Work Manager enables specific details such as asset, customer, or transaction histories and other critical information to be delivered to employees using mobile devices including smart phones, tablets, or laptop computers. Desktop systems are also supported. In turn, data is uploaded to an SAP system to generate follow-up work orders, status reports, customer invoices, charge backs and more.



SAP Work Manager Paperless Workflow

The paperless workflow process is as follows:

1. Workers log on to their mobile devices and download new work orders through a docking cradle or a real-time wireless connection.
2. Workers can then follow step-by-step job plans, verify work completed, and work status. Workers can also access additional details of a work order or notification to improve decision-making.
3. Workers update customer accounts, place orders, transfer or reassign work to another team member, or complete all required information and update to the SAP back-end system. The added data is accurate and usable, as SAP Work Manager enforces business rules on the mobile device. For example, by not allowing modifications or edits of objects if not allowed by the back end.
4. Workers transmit their updated or added data to the back end for any additional processing.

## 2.1 SAP Work Manager Functionality Overview

SAP Work Manager extends the following SAP ERP functionality to mobile devices:

### Work Orders

SAP Work Manager manages work orders by extending SAP ERP functionality through the following actions:

- Displaying work orders and their details
- Editing work orders and their details
- Creating work orders and their details

### Notifications

SAP Work Manager uses the SAP ERP notification functionality to push notifications to a mobile device. From there, users can perform the following actions:

- Display and edit notification details
- Create and edit existing notifications
- Delete existing notifications

**Notification Push:** A user can receive a notification push when an administrator sends out an emergency work order or assignment. The user receives this on their mobile device without having to transmit to the back end or syncing their device. The work order or assignment is automatically pushed to their device and a notification is triggered to alert the user that a new work order or assignment is available to them.

### Time

SAP Work Manager extends the necessary time tracking functionality in SAP ERP to the mobile device so field personnel can track their time efficiently and accurately.

### Single Sign-On (SSO)

Single Sign-On (SSO) allows the user to log into the SAP Work Manager from the mobile device using single sign-on credentials without having to enter your back end ERP user name and password. In addition, once logged in with SSO, the mobile user has the ability to access another mobile application without the need to log in again.

SSO gives the mobile user the ability to change or reset the log in password from the mobile device.

## Linear Asset Management (LAM)

Linear Asset Management provides functions with which you can describe, display, and manage linear assets.

Linear assets are technical systems with a linear infrastructure whose condition and properties can vary from section to section (dynamic segmentation).

Examples of linear assets include:

- Pipelines
- Roads and railway tracks
- Overhead power lines and cables

You can 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. This enables you to monitor what condition your linear assets are in, identify where there is damage or a defect (using the start point, end point, and offset), and manage all types of maintenance tasks (planned, unplanned, and preventive).

## Inspection Rounds

Inspection rounds have the following characteristics:

- An inspection round is planned, for example, once a week, once a day, or for each shift
- An inspection round is always completed within one day, or within one shift
- The duration of an inspection round includes the work and the round itself within one plant
- Work is done on different technical objects. The number of technical objects can vary, depending on the sequence and the time required.
- The work activities in an inspection round are similar and require the same tools, replacement parts, and qualifications
- You can assign an inspection round to either a work center or to a person
- Measuring points on an inspection round are displayed in an easy to use wizard format
- If required, the user can create measurement documents from the inspection round
- If follow up activities are necessary, the user can create notifications from the inspection round

An inspection round can involve the following objects:

- Functional locations
- Equipment
- Measuring points

## Attachments

SAP Work Manager supports viewing of user data or transaction data attachments on the mobile device. This includes documents such as 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.

By default, the option to download attachments is turned on, but this can be configured through the Configuration Panel based on work order type. If the work order has any attachments, only limited information regarding the attachments is fetched during an initial sync. The attached content is downloaded to the device through a push process only at user request. All attachments are maintained in a central repository and controlled through the Configuration Panel.

Depending on how your administrator has configured your system, you will download attachments using either synchronous download or asynchronous download. See [Working with Attachments \[page 25\]](#) for more information.

You can download attachments for any work order. On Android devices, you can only view attachments from the Download folder in the device. You can not open the attachment from within the application as you can with an iOS device.

Downloading and uploading attachments are supported for:

- Orders (header level)
- Orders (header level asset)
- Order (object level)
- Operations through Associated Asset
- Operations through PRT
- Notifications (header level)
- Notifications (header level asset)
- Item (object level)
- Item through Associated Asset
- Equipment
- Functional Locations

Uploading attachments is supported for locally created notifications, work orders, functional locations, and equipment.

## Multiple Language Support

The supported languages include:

- ar - Arabic
- cs - Czech
- de - German
- es - Spanish
- fr - French
- he - Hebrew
- hu - Hungarian
- it - Italian
- ja - Japanese
- ko - Korean
- pl - Polish
- pt - Portuguese
- ro - Romanian

- ru - Russian
- sh - Serbian
- sk - Slovakian
- sv - Swedish
- tr - Turkish
- zh-CN - Simplified Chinese

## 2.2 How SAP Work Manager Works

The SAP Work Manager client is the component that you will work with. The client runs on the mobile device used to track your work. All features described in this manual are performed on the SAP Work Manager client.

When new measurements are entered into the SAP Work Manager client, the client saves this information on the mobile device. A transmit must be performed to update the SAP database with the new information. A transmit is a connection between the mobile device and a component of SAP Work Manager called the server. The server will connect to the SAP Work Manager database and update it with the new information entered on the mobile device. The server will also download any new information from the SAP ERP database and pass it back to your mobile device.

When the SAP Work Manager client and server connect, the client will send the server any changes you have made. The server will then update these changes to the SAP ERP application. The SAP Work Manager server will also retrieve any new information related to your work. This includes new work order lists, locations, equipment, and points since the last time you performed a transmit. After the server retrieves this information from the SAP ERP database, it sends it to the SAP Work Manager client, where you will see it displayed.

During a transmit, the SAP Work Manager server can add or change functionality on the SAP Work Manager client of your device. These changes can adjust the appearance of the client, such as adding a new button or a new screen. This is because the SAP Work Manager application can be easily modified by application developers to keep the application up to date with your current needs and responsibilities, making SAP Work Manager a flexible application. These changes then can be deployed to devices in the field when the client transmits to the server. No special actions are required when application changes are retrieved during a transmit. For example, you will not need to restart the client on your mobile device. You will be notified ahead of time before such changes occur, and should be given training and information on how these changes will relate to your work.

Your mobile device will need access to your work site's computer network when performing a transmit. Access can vary on different work sites. Some common ways to access a network are:

- A modem connection using a standard phone line
- A network connection using a network card and a network cable
- A radio frequency wireless connection
- A wireless cellular phone modem

The same information is sent back and forth between the SAP Work Manager client, SAP Work Manager server, and the SAP ERP application using any of these connection types. How to perform a transmit and which connection type to use are discussed in more detail later in this guide.

## 2.2.1 Mobile Add-On for ERP Overview

Mobile Add-On for ERP is a set of pre-built mobile applications that are used for:

- Increasing productivity by eliminating paperwork and reducing foot traffic
- Improving decision-making by giving mobile workers easy data access at the point of performance
- Gaining the maximum value from enterprise applications, such as SAP, with timely and accurate data collection
- Lowering operating costs by reducing overhead and getting more from existing resources

With mobile solutions from SAP, organizations can create a seamless flow of information between business units that improve efficiency and move operations closer to real-time.

By deploying multiple products, organizations ensure that real-time data updates to one application can drive another action or transaction in a parallel business unit. Using Mobile Add-On for ERP, organizations eliminate delays traditionally caused by paperwork backlogs and communication flaws, streamlining work flow and delivering benefits to multiple business units.

The SAP Mobile Platform makes it simple and cost-effective to deploy and manage multiple Mobile Add-On for ERP products. Built on the SAP Mobile Platform, using Agentry, all Mobile Add-On for ERP products are 100% configurable and centrally administered through application updates that automatically flow to users' devices while deployed in the field. Agentry provides the flexibility, scalability, and features that ensure Mobile Add-On for ERP mobile applications are future-proof and remain on the cutting-edge of mobile technology.

In addition to the ability to deploy on a wide range of mobile devices and utilize an array of communications methods, Agentry provides out-of-the-box integration with more than 25 popular mobile peripherals, including bar codes, RFID, GPS, and GIS, as well as support for multiple international languages.

Businesses can lower the total cost of ownership for their collective mobile projects by deploying on a single mobile platform. The addition of new Mobile Add-On for ERP products does not add an additional burden to your IT team because they are prepackaged proven applications built on the same underlying technology. Solutions can be integrated to feed multiple back end systems, improving communications across the enterprise.

# 3 Installing the Client on an iOS or Android Mobile Device

## Prerequisites

Your mobile device must be able to connect to the Internet in order to download the client application.

## Context

First, you will download the SAP Work Manager client to your iOS device from the App Store and to your Android device from the SAP Service Marketplace. A demo version is initially downloaded, complete with demo data, so that you can get accustomed to the application before connecting to your production server. When you are ready, you simply exit the demo and log in to your server and start working.

### i Note

Your iOS device must be on iOS version 7 or 8.

## Procedure

1. Go to the applicable store for your device and in the Search box, type `SAP Work Manager` and tap [Search](#).  
The application description opens.
2. Tap [Free](#) and then tap [Install](#).  
The SAP Work Manager client application is downloaded from the store and an icon is placed on the mobile device.
3. Tap the icon to open the application.  
A log in screen displays with the default user `Demo` listed in the [User](#) field.
4. Tap [OK](#) to log in. You cannot change the user name and no password is necessary.  
The SAP Work Manager client opens and is ready to use with pre-populated demo data.

## Results

The SAP Work Manager client is installed on your mobile device in Demo mode.

### i Note

To check the version of the client software, tap the Information icon on the *Module* screen of the mobile device.

## Next Steps

Once you are comfortable with the application and want to begin using it with your production server, tap *Exit Demo*. A fresh log in screen is displayed. Enter your user name and password to log in.

## 4 Transmitting Overview

The client is designed to run independently of the server. This means that it is not necessary to maintain a constant connection between these two components of the application. The client will function normally on its own and provide you with the information needed to perform your tasks. The only time these two components need to be connected through a network is during a transmit.

A transmit is defined as a communication between the client and server during which information is exchanged. Put another way, a transmit is when the client tells the server what new information it has, based on the information you have given it; and the server tells the client what has changed in the SAP system that is relevant to you. Additionally, the server also provides the client with changes to the application, if any.

When you perform a transmit, the client will first send up any changes you have recorded while performing your work. The server will then add these changes and new information to the SAP application. Next, the server will check the SAP ERP software for new or changed information and retrieve it. It will then send this information down to the client.

Once the client receives new information from the SAP ERP system, it will be displayed to you in the associated screens. For example, items such as new locations or equipment will be available for selection or modification as needed, if applicable. Likewise, any information sent to the SAP ERP will also be available to SAP ERP users immediately.

During a transmit, the server will send down any changes to the application itself. These changes can include new or modified screens, new buttons, or old buttons to remove from existing screens, added and removed fields, and a multitude of other possible changes. When these changes are sent to the client, they will be in effect immediately. After the transmit has completed, you will see any modifications right away. You do not need to restart the client or perform any other special tasks. Normally when these types of changes occur, you will be notified about them in advance and, if necessary, be given instruction on how to use any new features or functionality. Some changes may occur that will not affect how you interact with the client. You may see messages during the transmit that indicate a change has occurred, but it is possible that the change affects the inner workings of the client without changing its appearance.

Transmits can be performed at any time, provided the necessary network structure is available. For example, if performing a transmit using a dial-up modem connection, a phone line must be available. If a wireless connection is in use, the device must be within the coverage area of the wireless network. If the network resources are available, you can perform a transmit any time you wish to update new information to the SAP ERP software and retrieve new information from it.

### 4.1 Methods of Transmitting

To perform a transmit between the client and server, there must be a network connection between these two components. This network connection can be established using one of several different methods. Which one is used depends on the capabilities of the mobile devices in use and the network structure at a work site.

Regardless of how the network connection is made, the information that is transmitted is the same. Application changes, new information from the SAP ERP software, and information to update to SAP ERP is always exchanged between the client and server.

*WebSockets* is a standard for allowing bidirectional real-time communication between clients and servers that is encapsulated within another transport protocol, such as HTTPS. Agentry on the SAP Mobile Platform uses WebSockets to route its binary communication protocol (known as ANGEL in previous Agentry releases) through HTTPS.

WebSockets enables Agentry components to work consistently across the enterprise, in tandem with other SAP Mobile Platform components, and allows Agentry to leverage WebSockets-aware HTTP reverse proxies.

Once the transmit is completed, you can be confident that the information you have sent is processed, and the information you have received is that which you need for your work.

## 4.2 Performing the Initial Transmit

### Context

The following procedure explains how to start the SAP Work Manager client on the mobile device for the first time and perform the initial transmit. Note that the initial transmit is normally performed only once, just after the application has been installed to the mobile device. In some environments, it is possible to install the application in a way where the need for the initial transmit is not necessary.

Ensure that the device running the client has a network connection established or is plugged into a desktop computer using the appropriate cable connection.

#### **i** Note

If you have never logged in to SAP, you must go to a desktop and change your password before using any mobile device.

### Procedure

1. To start the client, tap the *Agentry* icon from the main screen of your mobile device.

The client starts, displaying the logon screen.

2. Using the on-screen keyboard, enter your user ID and password. Your credentials are needed each time the client is started. Once you enter your ID and password, tap *Go*.

A message stating that you must connect to the server to log in appears.

3. Tap *OK* to continue. Choose your server from the list. If your server is not among the list, tap *Other* and continue on to the next step.

Your transmit will start immediately after you highlight and tap your selected server, unless you selected *Other*.

4. If you selected *Other*, type in the name or IP address of your SAP Mobile Platform into the *Server* field. If the port number is different, type the port number into the *Port* field using the on-screen keyboard. When done, tap *Login* to start the initial transmit.

When the transmit is complete, you are taken to the Main module screen of your application.

## Results

The SAP Work Manager application on your device is now populated with your work tasks and service requests that are assigned to you. See the other sections in this guide for more information on using the application.

## Next Steps

If your site has the background send feature enabled, see the [Working with Background Send \[page 37\]](#) topic for information on how to enable the feature. If your site does not have background send enabled, you are finished with the initial transmit.

### 4.2.1 Sharing a Mobile Device between Users

Two users can share one mobile device but log into their own separate accounts on the SAP Work Manager application.

If two users share a mobile device, and the second user encounters an error when attempting to perform the initial transmit, or sync, the second user has the following options:

- Reset the client. The first user loses all transactions and data and will have to perform an initial sync when they next receive the mobile device.
- Give the mobile device back to the first user. The first user corrects the errors found in their transactions and data so that the second user can perform their initial sync.

## 4.3 Performing a Standard Transmit

### Context

A standard transmit is performed after you have entered information in the SAP Work Manager client, or if there is new information to be retrieved from the SAP application. You can perform a transmit at any time a network connection is available.

### Procedure

1. To begin the transmit, tap the *Transmit* icon, located near the top right of most screens.  
The *Transmit* screen displays.
2. The transmit starts automatically.

The transmit progress displays on the screen. The last message displayed on this screen will be `Logging [User ID] out`. This indicates that the transmit has completed successfully.

3. Tap **Stop** to halt the transmit, if necessary.

When the transmit is complete, the main screen of the application displays.

## Next Steps

If your site has the background send feature enabled, see the [Working with Background Send \[page 37\]](#) topic for information on how to use the feature. If your site does not have background send enabled, you are finished with the standard transmit.

# 5 Common Functions for SAP Work Manager

## 5.1 Filtering Objects in the List View

### Use

Often, the number of objects assigned to you, such as work orders or notifications, can be quite large. A large list can make it difficult to locate a specific object. You can use filtering to create a list where only certain objects are displayed rather than all of them, according to your specified criteria. The objects not displayed in your filtered list are still stored on the client and are not deleted.

You can filter on multiple fields on your object list. Build your filter by adding one or more *column - operator - value* conditions to your filter list. When you apply your filter, the main screen displays only objects that match every condition on your filter list.

### Working with Filters

To create a filter, tap the *Filter* icon at the top of the list pane. A screen displays where you select your first column to filter, the value to filter, and the comparison to make between the column and the value selected. See the following subsections for information on columns, operator values, and filter results. After you are satisfied with your initial filter values, tap *OK* to set the values. Create more filters by tapping the *+* icon. When you are finished adding filters, tap *OK* on the main *Filter List* screen.

There is no limit to how many filters you can create, though the more filters you add, the fewer objects are returned to your object list when the filter is applied. If you apply too many filters to your object list, you run the risk of having an empty object list returned back to you.

Once you create and enable your filter or multiple filters, the main object screen only displays the objects that match the filter criteria.

### Column

The column selected in a filter is one of the columns in the main screen of list items. You select the column to filter on. The value in this column for each record is compared to the value you enter, using the comparison you choose.

### Operator

The operator is the comparison relationship between the column and the value. You select the comparison from a list of choices in the dropdown menu. The comparison determines which records are displayed in the

work order list by comparing the selected column to the selected value. Following are detailed descriptions of the comparisons that can be made in a filter:

- **Less Than:** Displays the records in the screen where the value of the selected column is less than the value you entered. The *Less Than* value excludes records where the value of the column is equal to the value you entered.
- **Less Than or Equal:** Displays the records in the screen where the value of the selected column is smaller than or equal to the value you entered. The *Less Than or Equal* value is the same comparison as *Less Than*, except that records that are equal to the value you entered are also included in the filter results.
- **Equal:** Displays the records in the screen where the value of the selected column is the same as the value you entered.
- **Not Equal:** Displays the records in the screen where the value of the selected column is not the same as the value you entered.
- **Greater Than or Equal:** Displays the records in the screen where the value of the selected column is greater than the value you entered. The *Greater Than or Equal* value also includes any records where the value of the column is equal to the value you entered.
- **Greater Than:** Displays the records in the screen where the value of the selected column is greater than the value you entered. The *Greater Than* value excludes any records where the value of the column is equal to the value you entered.
- **Between:** This comparison requires you to enter two values rather than one. When the values are entered, the screen displays the records where the value of the selected column is  $\geq$  and  $\leq$  the second value.
- **Not Between:** This comparison requires you to enter two values rather than one. When the values are entered, the screen displays the records where the value of the selected column is less than the value you entered and greater than the second value you entered.
- **Contains:** You can type in a partial string of characters to compare against all records in your object list. The filter returns all records with values that match the string. For example, if you enter *or* as your *<Contains>* value, the filter returns objects labeled **work order**. The string of characters can be located anywhere within an object. The string of characters is not case-sensitive.

## Value

The value for a filter is compared to the selected column using the operator you choose. You select the value from a displayed list. The list contains the value of the selected column for each record in the work order list. If more than one record contains the same value for the selected column, that value is only listed once.

## Result

Once you create a filter, the object list is immediately refreshed to display only the results matching the filter you defined. The filter icon displays an *X* next to it, indicating a filter is in use.

Tap the filter icon to edit, add to, delete some filters, or to remove all filters and return to the full object list.

## Editing and Deleting Filters

You can edit any filter you have placed on an object. On the *Filter List* screen, tap the filter row you want to edit. The *Filter* screen displays. Here, you can edit the *<Column>*, the *<Operator>*, and the *<Value>* fields. When finished editing any or all of the fields, tap *OK* to return to the *Filter List* screen.

To delete a filter, tap on the *X* to the right of the filter row you wish to delete from the *Filter List* screen. The filter is deleted from your filter list. To remove all filters, tap the *Delete Filter* button.

If you have previously created a filter on an object list and then deleted the filter on the list, the next time you tap the *Filter* icon to set a filter, the previous filter settings you had created and set before will display.

## 5.2 Sorting Objects in the List View

### Use


You can change the order of the objects in a list view by selecting multiple fields to sort by in a hierarchical fashion.

You are able to change the order in which items in a list are ordered by selecting a property of the object specifying whether it should display ascending or descending. Using the sort feature, you can also reorder or rearrange the order by which multiple fields are sorted in a hierarchical fashion. For example, if originally your work order list is sorted ascending according to plant, but all of your work orders are located in Plant 01, you may want to reorder your work order list to sort descending by due date first and then equipment type.

### Sorting a List

#### i Note

The following instructions are iOS-specific. You may encounter minor differences in screen configuration and behaviors when sorting on other platforms.

For example, to sort an object list on an iOS device, tap the *Sort* icon (which looks similar to the following: ) at the top of the list pane. The sorting screen displays, showing you all the fields available to you for sorting. You can rearrange the order of the fields and sort each field by ascending or descending order.

To select fields to include in the sorting rearrangement, tap in the + icon beside their row. To move the selected fields into a different sort position, hold the icon on the far right of a row, and use it to move it up or down to its new position in the sort list. Do the same for the remaining fields that you want to reposition in the sort order.

To toggle whether a field is sorted in ascending order or descending order, tap the up or down arrow buttons on the far right of the selected row. Choosing the up arrow selects ascending order. Choosing the down arrow selects descending order.

When satisfied with your sorting arrangement, tap *OK* to confirm. Tap *Cancel* to cancel your changes and exit out of the sort screen. If you have accepted your sorting choices, you are returned to the object list panel or list screen. Your new sorting arrangement displays on the list screen.

## 5.3 Performing Complex Table Searches

### Use

The Agentry client now supports partial string matching (also known as a *contains* search) when searching complex tables. In previous releases, the Agentry client supported only *begins-with* searches, which provided fewer results when searching complex tables.


The Agentry client must implement an index for an International String field type (case-insensitive). The ability to search against this index is implemented on all supported clients that use the SQLite engine (which is currently limited to Android, iOS, and WPF clients). The search behavior of older clients will differ, since they do not support SQLite engine and will not know about the new index.

### Working with Complex Table Searches

#### i Note

To use this feature, your server must be SMP 3.0 SP17 or higher and your Agentry Client must be 71.4.1 or higher.

If there is a `<Search>` field present, you can perform a search in any complex table in SAP Work Manager.

However, only `<Search>` fields that display the complex table icon () to the right of the field are able to perform wildcard searches within the table.

A wildcard search means that you can type in a string of characters that is located anywhere in the field value. For example, entering *test* into a complex table search field returns things such as *AUTOTEST*, *Test Partner*, *equipment 49 testing pump*, and *partner TESTING pump*. You do not need to put asterisks in your search to perform a wildcard search.

If you do not see the complex table icon to the right of the `<Search>` field, the value you enter in the field only returns characters that begin with what is typed in the field. Again, using the previous example, entering *test* into the search field would only return *Test Partner* in this case.

## 5.4 Viewing Work Orders

### Context

The Details pane of the main Work Manager screen displays the details for a selected work order.

## Procedure

1. Select a work order from the list.

The details of the selected work order display.

2. The Details screen is a view-only look at the details of the selected work order. There are up to six fields that you can tap to open further details. Tap on any one of the three fields that are underlined for more details:
  - Functional Location
  - Equipment
  - History
  - Notification
  - Linear (displays if assets applied are of Linear category)
  - PRT (Production Resources or Tools)
3. In addition to the main Detail tab, there are other additional icons that you can select for information related to the selected work order. Tap any of the icons to open the appropriate screen for information:
  - Notes
  - Operations
  - Components
  - Pending
  - Object List
  - Attachments

## Results

With the details displayed for a work order, further available actions are listed in the Actions menu at the top right of the screen. The list of actions depends on the type of work order selected and the current status of the work order. For example, the available actions for a work order that has been started could include:

- Add Operations
- Add Components
- Add Notification
- Edit Linear
- Record Points
- GeoTag from Map
- GeoTag from Location
- Upload Picture
- Upload Document
- Discard Work Order

## Next Steps

There are several actions you can take while displaying the work order details:

- **Select an action from the Actions menu:** the list of available actions in the Actions menu is dependent on the type of work order and its current status
- **Add or edit a notification:** tap the *Notification* field to open the Notifications list screen
- **Change the work order status:** all available statuses are listed in the Actions menu

## 5.5 Clearing A Work Order from the Mobile Device

### Context

To remove, or clear, a work order from the mobile device without making changes to the back end, use the *Discard Work Order* option. *Discard* only removes the work order from the list on your mobile device. This is especially useful when you have made changes you do not want to keep and have not yet transmitted.

### Procedure

1. Highlight a work order to display its details.
2. Select *Discard Work Order* from the *Actions* menu.

A prompt is displayed asking if you are sure you want to discard the work order. If you tap *Yes*, the work order is removed from the List screen.

## Next Steps

If you clear a work order by mistake, initiate a transmit to pull down the information again to your device.

## 5.6 Working with Attachments

SAP Work Manager supports viewing of user data or transaction data attachments on the mobile device. This includes documents such as 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.

By default, the option to download attachments is turned on, but this can be configured through the Configuration Panel based on work order type. If the work order has any attachments, only limited information

regarding the attachments is fetched during an initial sync. The attached content is downloaded to the device via push process only at user request. All attachments are maintained in a central repository and controlled through the Configuration Panel.

You can download attachments for any work order. On Android devices, you can only view attachments from the Download folder in the device. You can not open the attachment from within the application as you can with an iOS device.

Downloading and uploading attachments are supported for:

- Orders (header level)
- Orders (header level asset)
- Order (object level)
- Operations through Associated Asset
- Operations through PRT
- Notifications (header level)
- Notifications (header level asset)
- Item (object level)
- Item through Associated Asset
- Equipment
- Functional Locations

You can also upload attachments to the following locally created objects:

- Work orders
- Notifications
- Functional locations
- Equipment

## Downloading Attachments

If an object has an attachment (either picture or document) that can be downloaded, it will be listed in the [Attachments](#) tab or icon, depending on your mobile device. Tap on the attachment that you wish to download to initiate the download process. When the process (either synchronous or asynchronous download) is complete, you can then access the attachment.

## Uploading Attachments

1. From the [Actions](#) menu, select either [Upload Picture](#) or [Upload Document](#), depending on the type of attachment you need to upload.
2. From either the [Upload Picture](#) or the [Upload Document](#) screen, click the [File Folder](#) icon to browse to the document file you want to attach. If you are attaching a picture, clicking the [Camera](#) icon allows you to take a photo using the integrated camera on your mobile device.
3. Type in a file name into the [File Name](#) field after selecting your attachment.
4. Click either [Finish](#) or [Done](#), depending on your device, when complete. The attachment is then uploaded to the object on your next transmit.

## Synchronous and Asynchronous Attachment Downloads

Depending on how your administrator has configured your system, you will download attachments by synchronous download or by asynchronous download:

- **Synchronous download:** After tapping on the attachment, a transmit immediately begins in order to fetch the document. Once the transmit is completed, you are brought to the document's screen, where you can view the document.
- **Asynchronous download:** After tapping on the attachment, a push request is sent to the back end to fetch the document, and you are returned to the Attachments screen. The document is downloaded in the background, and once the download is completed, a notification is sent to the client and a message pops up on your screen telling you that the attachment is ready for viewing.

### 5.6.1 Modifying an Attachment

After downloading an attachment sent to your client through the SAP Work Manager application, you can open and edit the document using an editing application of your choice and save the edited document back to SAP Work Manager.

#### i Note

You can only modify DMS documents downloaded to the SAP Work Manager application. You cannot modify BDS documents.

To modify an attachment:

1. Navigate to the *Attachments* tab or detail pane where the document you want to edit is located.
2. If your selected document is not yet downloaded to SAP Work Manager, tap to download it to the client. The attachment shows a status of *Downloaded*.
3. Navigate to where that document is downloaded on your mobile device. For example, navigate to the *Download* folder for Android mobile devices. iOS devices store different downloaded files in different applications based on their format, or you may have set your mobile device to save all your documents to your iCloud.
4. Open your selected document with an application you can use to edit your document. Make your edits to the document and save the document.
5. Return to the SAP Work Manager application. Navigate back to the *Attachments* tab or the detail pane where the attachment you are working with is located.  
Notice that the attachment now has a status of *Edited*. The status change in the application lets you know that you have made and saved changes to the original attachment in a different application on your mobile device.
6. You can now transmit to the back end. Your edited attachment is uploaded to the SAP server.

## 5.7 Inbound Transaction Management

The inbound transaction management feature allows you to complete a sync with the back end without interruption. Any errors that would have previously stopped the sync if this feature were not enabled will force the user to correct the errors on the mobile device before another sync can be attempted.

With the inbound transaction management feature enabled, any objects with error(s) are sent to a queue on the back end. Once an object is in the queue, an administrator can correct the error(s) and process the object to re-send it back to the client device. The inbound transaction management feature allows the user to continue working on the client without having to fix error(s), and therefore no down time is lost on the user side due to error handling.

When inbound transaction management is activated in the back end, your site administrator will configure one of several scenarios to occur to objects that are transmitted to and from your device:

- **Error processing only:** This scenario will probably be the most common use-case. If you attempt to sync to the back end, and there are object(s) that contain errors, you are no longer responsible for fixing those errors on the client device before the transmit to the back end will complete. Rather, the object(s) are removed from the device and placed into an administrative queue and flagged for a back end administrator to fix them while you can continue your work on site. Once the object(s) are fixed, they are sent back down to your device during the next sync and you are free to work with them once again.
- **Always check-in:** All transactions are locked when syncing to and from the back end. Any change to an object or the creation of a new object and then syncing to the back end requires an administrator to approve the objects in the Administrator Panel in the queue, re-send them back down to the client, before you can work with them again. Objects sent to you from the back end will originally display with a lock icon. You will need to perform an additional transmit to clear the lock and begin work.
- **Dependent transaction only:** When an object is sent up to the queue due to an error or multiple errors, the back end also verifies whether any other transactions are dependent on the queued object. If yes, those dependent objects are also sent up to the queue as well. Until the back end administrator fixes the error(s), you will not be able to work on either the main object or that object's dependencies.

### Object Locking

There are three objects on the client that can be locked: a service order, an assignment, or a confirmation. An object is locked if one of its transactions gets sent to the error queue in the back end, no matter what the configuration of your system is. When an object is locked, the most you can do for it on the client is:

- Copy it (Example: Copying a locked service order to create a new work order)
- Discard it. If you discard it, it will come back down again on the next transmit with a lock icon, as it was originally locked.
- Request attached documents. Document pushes are still allowed for locked objects.

Depending on the scenario and the transaction, after syncing your object can either leave your mobile device to join a queue in the back end or stay on the mobile device in a locked position (shown with a lock icon). This table will help you to understand what happens when a particular transaction occurs on a specific object for the most common transaction scenarios for all three of the configuration possibilities.

## Object Locking in SAP Work Manager

Transaction	Scenario	Lock Object on Transaction Failure	Lock Sub-Objects on Transaction Failure	Lock Parent Object on Transaction Failure	Comments
Work Order Add	Add a new work order	Work order - NO	Operation, component, document, etc. - NO	NONE	The newly added work order is removed from the client on transmit, so the lock is not applicable
Work Order Edit	Add an existing work order Add / edit an operation Add / edit a component etc.	Work order - YES	Operation, component, document, etc. - YES	NONE	The work order and all of the sub-objects are locked
Work Order Status	Start, Hold, Transfer, Complete Capture signature on completing a work order	Work order - YES	Operation, component, document, etc. - YES	Work order - YES	The work order and all of the sub-objects are locked
Component Issue	Issue a part	Component - YES	NONE	Work order - NO	Component is locked
Document Add	Attach a document / picture Add a work order Add a notification Add an equipment Add a functional location	Document - NO	NONE	Work order - NO Notification - NO Equipment - NO Functional location - NO	Will have the ability to add a document
Linear Add / Edit	Add / edit linear data on work order	LAM - YES	NONE	Work order - YES	Work order and all of the sub-objects are locked
	Add / edit linear data on operation	LAM - YES	NONE	Work order - YES	Work order and all of the sub-objects are locked

Transaction	Scenario	Lock Object on Transaction Failure	Lock Sub-Objects on Transaction Failure	Lock Parent Object on Transaction Failure	Comments
	Add / edit linear data on equipment Add / edit linear data on functional location	LAM - YES	NONE	Equipment - YES Functional location - YES	Equipment and all of the sub-objects are locked Functional location and all of the sub-objects are locked
	Add / edit linear data on notification	LAM - YES	NONE	Notification - YES	Notification and all of the sub-objects are locked
	Add / edit linear data on notification item	LAM - YES	NONE	Notification - YES	Notification and all of the sub-objects are locked
Characteristic Value	Add / edit characteristic value Add / edit characteristic value on equipment / functional location Add / edit characteristic value on work order / notification Add / edit characteristic value on operation / notification item	Characteristic value - YES	NONE	Equipment / functional location - NO Work order / notification - NO Operation / notification item - NO	Only the characteristic value is locked. The parent object is not locked.
Measuring Point	Read a measuring point	Measuring point - YES	NONE	Equipment / functional location - NO Work order / Notification - NO Operation / Notification item - NO	Only the measuring point is locked. The parent object is not locked.

Transaction	Scenario	Lock Object on Transaction Failure	Lock Sub-Objects on Transaction Failure	Lock Parent Object on Transaction Failure	Comments
Time Sheet	Add a time in CATS	CATS - YES	NONE	Work order - NO	Only the time sheet object is locked. The parent object is not locked.
	Add a time in labor	Labor - YES			
Notification Add	Add a notification	Notification - NO	Item, activity, cause, etc. - NO	NONE	The newly added notification will be removed from the client upon transmit, so the lock is not applicable
Notification Add to Work Order	Add a notification to a work order	Notification - NO	Item, activity, cause, etc. - NO	Work order - NO	The newly added notification will be removed from the client upon transmit, so the lock is not applicable
Notification Edit	Edit an existing notification  Add / edit item  Add / edit activity  etc.	Notification - YES	Item, activity, cause, etc. - YES	NONE	Notification and all of the sub-objects are locked
Notification Status	Start, Hold, Transfer, Complete	Notification - YES	Item, activity, cause, etc. - YES	Notification - YES	Notification and all of the sub-objects are locked
Task Status	Start, Complete, Success at notification level  Start, Complete, Success at notification item level	Task - YES		Notification - YES	Notification and all of the sub-objects are locked
Equipment Add	Add an equipment with a template	Equipment - NO	NONE	NONE	Newly added equipment will be removed from the client upon transmit, so lock is not applicable

Transaction	Scenario	Lock Object on Transaction Failure	Lock Sub-Objects on Transaction Failure	Lock Parent Object on Transaction Failure	Comments
Equipment Edit	Edit an equipment from the work list	Equipment - YES	Install, uninstall, classification, etc. - YES	NONE	Equipment and all of the sub-objects are locked
Install Equipment	Install a sub-equipment in an equipment	Equipment - YES Functional location - YES	NONE	Equipment - YES Functional location - YES	Equipment and all of the sub-objects are locked
	Install a sub-equipment in a functional location				Functional location and all of the sub-objects are locked
Uninstall Equipment	Uninstall a sub-equipment in an equipment	Equipment - YES Functional location - YES	NONE	Equipment - YES Functional location - YES	Equipment and all of the sub-objects are locked
	Uninstall a sub-equipment in a functional location				Functional location and all of the sub-objects are locked
Functional Location Add	Add a functional location	Functional location - NO	NONE	NONE	The newly added functional location will be removed upon transmit, so lock is not applicable.
Functional Location Edit	Edit a functional location	Functional location - YES	Install, uninstall, classification, etc. - YES	NONE	Functional location and all of the sub-objects are locked
GeoLocation	Add / edit geolocation on an equipment	GEO - YES	NONE	Equipment - YES Functional location - YES	Equipment and all of the sub-objects are locked
	Add / edit geolocation on a functional location			Work order - YES Notification - YES	Functional location and all of the sub-objects are locked
	Add / edit geolocation on a work order				Work order and all of the sub-objects are locked
	Add / edit geolocation on a notification				Notification and all of the sub-objects are locked

## Object Locking in Customer Service

Transaction	Scenario	Lock Object on Transaction Failure	Lock Sub-Objects on Transaction Failure	Lock Parent Object on Transaction Failure	Comments
Business Partner Add / Edit	Add / edit a business partner on a service order	Business partner - YES	NONE	Service order - YES	The service order and all sub-objects are locked
	Add / edit a business partner on a service notification			Service notification - YES	The service notification and all sub-objects are locked
Address Edit	Edit an address on a business partner	Address - YES	NONE	Service order - NO	The service order and all of the sub-objects are not locked
	Edit an address on an install base			Business partner - YES	

## Object Locking in Meter Management

Transaction	Scenario	Lock Object on Transaction Failure	Lock Sub-Objects on Transaction Failure	Lock Parent Object on Transaction Failure	Comments
Meter Install	Install a meter associated with a work order	Meter - YES	NONE	Work order - YES	Work order and all of the sub-objects are locked
Meter Replace	Replace a meter associated with a work order				
Meter Remove	Remove a meter associated with a work order				
Meter Repair	Repair a meter associated with a work order				
Aperiodic Meter Reading	Read an aperiodic meter associated with a work order				
Meter Disconnect	Disconnect a meter				
Meter Reconnect	Reconnect a meter				
Periodic Meter Reading	Read a periodic meter associated with a work order	Meter - YES	NONE	NONE	Only the meter object is locked; the parent object is not locked

## 5.8 Changing the Status of a Work Order

In order to change the status of a work order, you must first access its detail screen. All status options are located in the Action menu and the available statuses are enabled.

### Procedure

1. To access a specific work order, select it from the list screen.  
The details for the selected work order are displayed.
2. Select one of the available status options from the *Actions* menu.

### Results

The status is changed in the list screen, but is not updated in the back end until the next transmit.

## 5.9 Adding Notes to Work Orders

The notes for a selected work order are displayed by tapping the Notes icon at the bottom of the screen when you have a work order selected.

### Context

In this topic, the status history is listed, along with any notes attached to the selected work order.

### Procedure

1. Select a work order from the list screen.  
The details for the selected work order are displayed. The status history and any current notes are displayed in the Notes tab.
2. Tap the *Notes* icon at the bottom of the screen.
3. Tap the *Action* icon and select *Edit Notes*.  
The Add Note screen displays.

4. Tap the *Add Note* field to open the text editor.
5. Enter the desired notes about the work order and tap *Done* when complete. Tap *Finish* to add the note.

The Work Order Notes screen is displayed, displaying the text of the new note.

## Results

The work order details are displayed and the new note is now available in the Notes tab. A small transmit icon is displayed to the right of the work order name in the list screen to indicate that a change was made and is waiting for transmission.

## Next Steps

The note you added is only added locally to the mobile device. You must perform a transmit for the changes to be made to the back end.

## 5.10 Working with Equipment

A piece of equipment is an individual object that is to be maintained independently in the system. Pieces of equipment can be installed and dismantled at functional locations.

Equipment user data that are not related to the orders and notifications are vital for the service technician. Technicians can create orders and notifications for equipment that are physically nearby, even if they are not assigned to the technician.

Access the Equipment screen from the *Equipment* option of the main menu. When you first open the Equipment screen, nothing is displayed. Use the *Equipment Search* to search for equipment to add to your working list. After that initial view, your equipment list is automatically displayed, but you can search for a fresh set of equipment at any time.

Functions you can perform for equipment include:

- Install another equipment under the selected equipment
- Install an equipment under a functional location
- Remove an existing installed equipment from another equipment
- Remove an existing installed equipment from another functional location
- Edit functional location
- Edit equipment characteristics
- Create new equipment
- Edit the equipment
- Add a work order
- Add a notification to the equipment

- Geotag the equipment from the current location or from the map provided by your system
- Fetch and view a bill of materials for the equipment, if one is available
- View measurement reading history related to the equipment measuring point
- View measurement reading history related to functional location measuring point
- View orders and notifications history related to equipment and functional location
- View orders and notifications related to equipment and functional location

## Fetching and Viewing Equipment Bills of Material

If an equipment has a bill of material (BOM) associated with it, you can fetch it to your device and view it. BOMs are not automatically sent to your device with the equipment during an initial or subsequent transmits; you must request them through a fetch before you can view them. BOMs are read-only.

1. Navigate to the main *Equipment* screen and highlight an equipment.
2. Select the *Actions* menu. If the equipment has a BOM associated with it, the *Fetch Bill of Materials* menu item will be active. Select it to begin a transmit to fetch the bill of materials data from the back end to your client device.
3. When the transmit is finished, tap the *Actions* menu again and select *View Bill of Materials* to view the Bill of Materials screen for the selected equipment. Note that this screen is read-only.

## 5.11 Working with Functional Locations

Functional locations (FLOC) are elements of a technical structure (i.e., functional units within a system). Functional locations are managed independently in the system.

Functional location user data that are not related to the orders and notifications are vital for the service technician. Technicians can create orders and notifications for functional locations that are physically nearby, even if they are not assigned to the technician.

Access the FuncLoc screen from the *Functional Location* or *Locations* option of the main menu, depending on which mobile client you are using. When you first open the Functional Location screen, nothing is displayed. Use *Search* from the *Action* menu to search for locations to add to your functional location working list. After that initial view, your functional location list is automatically displayed, but you can search for a fresh set of locations at any time.

Functions you can perform for functional locations include:

- Update a current functional location
- Search for a functional location
- Add a functional location
- Edit functional location
- Edit equipment characteristics
- Discard an added functional location
- Install equipment to the notification
- Geotag the notification from the current location or from the map provided by your system

- Add a work order
- Add a notification
- View measurement reading history related to the equipment measuring point
- View measurement reading history related to functional location measuring point
- View orders and notifications history related to equipment and functional location
- View orders and notifications related to equipment and functional location

## 5.12 Settings Tab

The *Settings* tab contains the following editable fields:

- Technical Object Search Results
- Technical Object Working List

For more information on technical objects, see the [Working with Technical Objects \[page 37\]](#) topic.

You can also enable and disable the background send feature from the *Settings* tab. For more information on background send, see the [Working with Background Send \[page 37\]](#) topic.

### 5.12.1 Working with Technical Objects

### 5.12.2 Working with Background Send

#### Use

Allows a user to send up transaction data asynchronously in the background, without the need to manually start a traditional transmit. The user can continue to use the client while the transactions are being background sent.

#### Enabling, Disabling, and Using Background Send

Use the following subsections to learn how to enable and disable as well as how to use the background send feature.

## Enabling and Disabling Background Send

### i Note


When you first install and perform your initial transmit of SAP Work Manager, the background send feature is disabled.

To enable the background send feature:

1. Navigate to the *Settings* tab from the main screen of the application.
2. Check the *Enabled* checkbox in the *Background Send* section and click *Finish* at the bottom of the screen. A window displays asking you to confirm your changes and informing you that the changes require a full transmit to take place.
3. Click *OK* to initiate the full transmit. The client starts the full transmit. This transmit registers the new background send status with the server.

You can disable background send in the same way as you enable background send. Disabling background send also requires a full transmit after you uncheck the *Enabled* checkbox and confirm your changes.

## Using Background Send

When background send is enabled and you tap *Transmit* , a window displays giving you the option to transmit through background send or to perform a full transmit. Select *OK* to transmit through background send. Select *Transmit* to perform a full transmit. Opting to use background send allows you to continue your work with SAP Work Manager while the background send process sends up transactions to the back-end server asynchronously. After the background send process is finished, any changed work orders and notifications that were background sent to the SAP system are now locked. You can determine which objects are locked by the lock icon beside them in the work order or the notification list.


## Working with Errors while using Background Send

If an error occurs during the background send process, a window displays notifying you of the error. There are two buttons underneath the message; *Continue* and *Offline*. If you choose *Continue*, background send continues and attempts to post the transaction again. Selecting *Offline* puts the client in an offline state and allows you to correct the object error before resuming the background send process.

See the next section, *Working with Locked Objects* for information on how to unlock and edit objects.

Once you are finished correcting the object error, navigate back to the main SAP Work Manager menu and select *Go Online*. You are reconnected to the back end SAP server. The background send process resumes sending your transactions remaining in the queue. If more errors arise, repeat this process until no errors remain.

## Working with Locked Objects

After objects are sent to the back-end server through the background send process, they are locked on the client. Each locked object on the client is marked with a lock icon () in its respective list. You cannot work on

a locked object until you unlock it or you perform a full transmit on your client device. We recommend that you do not unlock and then perform edits to an object on a client, unless you are correcting object errors that you were alerted to during the background send process.

To unlock an object:

1. Navigate to the detail tab of the locked object. Tap the *Action* menu and select *Unlock*.  
A dialog appears asking you to confirm that you want to unlock the object.
2. To unlock the object, tap *Confirm*. Make your error corrections to the object.

When you are finished working with your unlocked object, you can navigate to the main SAP Work Manager menu, select *Go Online*, and resume the background send process.

Or, if you did not unlock and work on any objects to correct any errors, you can initiate a full transmit. When you perform a full transmit, all locked object data that was initially sent to the server is sent back down to the client. Now that both server and client object data are fully in sync, the client objects are unlocked, and you can safely work on them.

# 6 Working with Work Orders

## 6.1 Work Order List Main Screen Overview

From the initial SAP Work Manager screen, select [Work Orders](#). The main screen that displays is the Work Order list screen. This screen displays all of the work orders assigned to you in SAP as of the last transmit from the client to the server. Using this screen, you can select specific work orders, track the work done, change the work status, and view work order details.

Each record in the work order list represents one work order. You can add work orders or delete work orders if they have not yet been added to the SAP system through a transmit.

If a completed work order row displays a small transmit icon to the right of the work order name, it indicates that changes to the work order were made and need to be transmitted to the back end SAP server.

There are five work order statuses, noted by the status icon to the left of the work order: Received, Started, Hold, Transferred, and TECO (Completed).

**Header pane:** The header pane contains two icons: the Menu button takes you back to the main menu screen and the Actions menu icon opens the Actions menu options. The number of work orders is displayed below the header pane.

**Work order list:** The list of work orders currently saved on the client. Each record in the list represents one work order. Tap on a work order to expand it and see its details.

**Actions menu:** Allows you to perform a transmit, add a work order, or cancel out of the screen.

From the main Work Orders screen, you have several navigation options:

- **Menu:** Tap to go to the main applications menu
- **Actions:** The available Actions menu options for this screen are Add and Transmit.
- **>:** Tap any work order in the list to open its Details screen. See below for details.

Tap a work order and then tap [Actions](#) to display the actions available for that work order. The menu list varies, depending on the current state of the selected work order:

- **Start:** Starts the selected work order
- **Edit:** Edits the work order
- **Hold:** Puts the work order on hold
- **Transfer:** Transfers the work order to another user
- **Complete:** Completes the work order
- **Edit Notes:** Adds a note to the work order
- **Add Notification:** Adds a notification to the work order
- **Record Points:** Record a measurement to the work order
- **Add Operation:** Adds an operation to the work order
- **Add Component:** Adds a component to the work order
- **GeoTag from Map:** Geotags the work order from the map provided to you by the administrator of the system

- **GeoTag Current Location:** Geotags the work order using the current location. GPS must be turned on in order for this menu item to work.
- **Upload Picture:** Upload a picture to the selected work order
- **Upload Document:** Upload a document to the selected work order
- **Discard Work Order:** Deletes, or clears, the work order from the client
- **View Equipment:** Views the equipment associated with the work order
- **Transmit:** Transmit any changes made on the client to the back end
- **Cancel:** Cancel out of this menu and return to the work order detail screen

## 6.1.1 Starting A Work Order

### Procedure

1. On the main Work Order screen, highlight a work order that is on hold or received and tap the *Actions* menu.
2. Tap the *Start* option.

### Results

The work order changes to a *STARTED* status.

## 6.1.2 Placing A Work Order on Hold

### Procedure

1. On the main Work Order screen, highlight a work order that is started or received and tap the *Actions* menu.
2. Tap the *Hold* menu option.  
The Hold WO screen displays.
3. Select a reason for the hold and tap *Done*.  
The Add Time screen displays.
4. Complete the Add Time fields and tap *Finish*.

### Results

The notification changes to a *HOLD* status.

## 6.1.3 Transferring a Work Order

### Procedure

1. On the main Work Order screen, highlight a work order that is Started, Received, or on Hold and tap the *Actions* menu.
2. Tap the *Transfer* option.

The Transfer Work Order screen displays.

3. Fill out the fields required either through the drop-down menus or by using the on-screen keyboard. Tap *Finish*.

A prompt displays, asking if you want to add time to the work order before the transfer.

4. Tap *Yes* to open an Add Time screen; tap *No* to continue the transfer without adding time to the work order. Tap *Finish* to continue.

The work order is transferred to the selected user with the reason for the transfer and optional notes.

5. Tap *Finish*.

### Results

The notification changes to a *TRANSFERRED* status.

## 6.1.4 Completing a Work Order

### Procedure

1. On the main Work Order screen, highlight a work order that is Started and tap the *Actions* menu.
2. Tap the *Complete* menu option.

If the work order contains notifications, a message is displayed that says 'All notifications for this work order will be automatically completed.' Tap *OK* to continue.

The Complete WO screen displays and you can optionally add a completion note.

3. Optionally, add a note. Tap *Done*.

A prompt displays asking if a signature is required.

4. If a signature is required, tap *Sign* to open the signature screen and sign. If a signature is not required, tap *Finish*.

The Add Time screen displays.

5. Complete the Time Sheet fields and then tap *Finish*.

## Results

The notification changes to a *COMPLETE* status.

## 6.1.5 Adding A Work Order

### Procedure

1. From the main Work Orders list screen, tap the *Actions* menu.
2. Tap the *Add* menu option.  
The Add Work Order screen displays.
3. All fields on this screen are required. Fill out all fields using either the drop-down menus or the on-screen keyboard and tap *Next* to continue.  
  
The second Add Work Order screen displays.
4. Fill in the *Priority*, *Functional Location*, and *Equipment* fields, and optionally add a *Note* using either the drop-down menus or the on-screen keyboard and tap *Next* to continue.  
  
The Add Operation screen displays.
5. Complete all fields using either the drop-down menus or the on-screen keyboard and tap *Finish* when complete. Note that adding notes in the *Note* field is optional.  
  
The new work order is added to the work order list on the main Work Order list screen.
6. If a component is needed, follow the steps found in the [Adding a Component \[page 48\]](#) topic.

## Results

The new work order is added to the bottom of the work order list on the main Work Order list screen.

## 6.1.6 Editing A Work Order

### Procedure

1. On the main Work Order screen, highlight a work order and tap the *Actions* menu.
2. Tap the *Edit* menu option.  
The Edit Work Order screen displays.
3. Fill out or edit all fields using either the drop-down menus or the on-screen keyboard and tap *Next* to continue.  
  
The second Edit Work Order screen displays.

4. Fill out or edit all fields using either the drop-down menus or the on-screen keyboard and tap *Finish* to finish editing.

## Results

The edited work order is complete and viewable on the main Work Order screen.

### 6.1.7 Work Order Notes Screen

Tap a work order from the work order main screen to display the work order detail screen that displays the detailed information about the work order. Tap *Work Orders* at the top left of the screen to return to the main work order screen.

The tabs at the bottom of the screen (Notes, Operations, Components, More) allow you to navigate to different sections of the work order or work with the work order.

The Notes tab displays all notes added to the work order. To add another note, tap the *Note* icon to access the Notes tab. Then tap the *Action* menu and select *Edit Notes*. Type in a new note and tap *Finish* when complete. The new note on the work order will save locally. You must transmit to save the new note to the back end.

### 6.1.8 Work Order Detail Tab

All of the following detail options are available on all clients except the Apple iPad and the Android tablet. On the tablets, there is only the basic Detail view.

Tap a work order from the main Work Order screen to display the Work Order detail screen that displays the detailed information about the work order. Scroll down on the screen to display additional fields.

Tap *Work Orders* at the top left of the screen to return to the Work Order main screen.

The tabs or icons (Notes, Operations, Components, and More) allow you to navigate to different sections of the work order or work with the work order.

From the Detail screen, tap the *Actions* menu to either change the status of the selected work order or to access additional information about the work order.

## Viewing Equipment

Tap the *View Equipment* option on the *Actions* menu to display additional details about that item.

A piece of equipment is an individual object that is to be maintained independently in the system. Pieces of equipment can be installed and dismantled at functional locations.

Tap *Work Order* in the top left of the screen to return to the Detail screen for the individual work order.

## Viewing Locations

Tap [View Location](#) from the [Actions](#) menu to open the details of the functional locations.

Functional locations (FLOC) are elements of a technical structure (i.e., functional units within a system). Functional locations are managed independently in the system.

Tap [Work Order](#) at the top left of the screen to return to the detail screen for the individual work order.

At the bottom of both the Location and Equipment screens are icons that you can use to access additional information: Class, Points, and Docs.

## Viewing Classes

Tap the [Class](#) icon to open the Classification screen. It contains line items of all the classes and displays the Class, Name, and class Type.

Classes allow you to classify materials with the same characteristics. A material can be assigned to one or more classes. Classification data is valid for the whole company.

## Viewing Points

Tap the [Points](#) icon to open the Points detail screen, which contains a list of the measurement and test points.

Points are used to enter measurement and counter readings for the equipment. You enter points when you want to document the condition of a piece of equipment at a particular point in time.

## Viewing Documents

Tap the [Docs](#) icon to open the Docs detail screen. It displays a list of all associated documents with the work order.

The Docs screen includes the following information: Type, Document, Points, Value, Status, and Location.

## 6.1.9 Work Order Equipment Detail Screen

All related work orders, notifications, history orders and notifications, partners, warranty, contract, and measurements document history from equipment or functional locations are viewable from the equipment hyperlink or icon from the work order detail screen.

### i Note

You can only edit equipment and functional locations from the Equipment and Functional Location work lists (the main tabs or icons). The tabs or icons discussed in this section are view-only.

Tap the [Equipment](#) hyperlink or icon from the main work order detail screen to view the Equipment details screen. You can also access the [Equipment](#) hyperlink or icon through an operation, notification, or notification item detail screen. The following sub-tabs are available from this screen:

- **Equipment Details:** The list view that was built by the user during the search or add phase.
- **Classification:** Displays the measuring points within the equipment object.
- **Measuring Points:** Displays the measuring points within the equipment object.
- **Warranties:** Displays the list of warranties from the equipment object.
- **Partners:** Displays the list of partners from the equipment object.
- **Related Orders:** List of work orders that are on the device that match the work order's equipment or an operation's equipment, matching the equipment currently being viewed.
- **Related Notifications:** List of notifications that are on the device that match the notification's equipment or an item's matching equipment that is currently being viewed.

## 6.1.10 Work Order Functional Location Detail Screen

All related work orders, notifications, history orders and notifications, partners, warranty, contract, and measurements document history from equipment or functional locations are viewable from the funcloc hyperlink or icon from the work order detail screen.

### i Note

You can only edit equipment and functional locations from the Equipment and Functional Location work lists (the main tabs or icons). The tabs or icons discussed in this section are view-only.

Tap the [FuncLoc](#) hyperlink or icon from the main work order detail screen to view the Functional Location details screen. You can also access the [FuncLoc](#) hyperlink or icon through an operation, notification, or notification item detail screen. The following sub-tabs are available from this screen:

- **Functional Location Details:** The list view that was built by the user during the search or add phase.
- **Classification:** Displays the measuring points within the functional location object.
- **Measuring Points:** Displays the measuring points within the functional location object.
- **Partners:** Displays the list of partners from the functional location object.
- **Related Orders:** List of work orders that are on the device that match the work order's functional location or an operation's functional location, matching the functional location currently being viewed.
- **Related Notifications:** List of notifications that are on the device that match the notification's functional location or an item's matching functional location that is currently being viewed.

## 6.1.11 Work Order Operations Screen

Tap a work order from the work order main screen to display the work order detail screen that displays the detailed information about the work order.

Tap [Work Orders](#) at the top left of the screen to return to the work order main screen.

The tabs at the bottom of the screen (Notes, Operations, Components, More) allow you to navigate to different sections of the work order or work with the work order.

Tap the [Operations](#) icon to open the Operation detail screen. The Operation screen displays a list of tasks and the operations necessary to complete the work order. Tap on a line item on the Ops detail screen to expand that item, displaying further details and options for that operation.

### Actions for Operations

From the Operation detail screen, you can perform a [Transmit](#) or [Add Operation](#) using the [Actions](#) menu.

Tap an operation to see the details. With the operation expanded, tap the [Actions](#) menu to view the available actions for the selected operation. The list will vary, depending on the operation selected:

- **Add Sub-Operation:** Adds a sub-operation to the main operation. Adding a sub-operation requires the same steps as adding a primary operation.
- **Edit Notes:** Edits an existing note attached to the operation, as well as adds a note to the existing notes on the operation
- **Edit Linear:** Edit a linear measurement in the operation
- **Delete:** Deletes the operation
- **Start:** Starts the operation
- **Hold:** Puts the operation in a hold state
- **Transfer:** Transfers the operation to a new user
- **Complete:** Completes the operation. You can reverse this operation as long as the status has not yet been transmitted to the back end.
- **View Notification:** Allows you to view notification details of the operation

### 6.1.11.1 Adding an Operation

#### Procedure

1. Tap [Add](#) from the [Actions](#) menu of the main Operations screen.

The Add Op screen displays.

2. Enter a short text description in the [Description](#) field and any other application fields. Tap [Done](#) when you are finished or tap [More](#) to add another operation.

The Add Note screen displays.

3. Tap the right arrow at the bottom right of the screen to continue to the Add Note screen.
4. If desired, add a note and then tap *Finish*.

## Results

The new operation is added to the bottom of the Operations list.

## 6.1.12 Work Order Components Screen

Tap a work order from the Work Order main screen to display the Work Order detail screen that displays the detailed information about that work order. Tap *List* at the top left of the screen to return to the Work Order main screen.

The tabs at the bottom of the screen (Notes, Ops, Components, More) allow you to navigate to different sections of the work order or work with the work order.

Tap the *Components* icon from the bottom of the Work Order detail screen to display the Component detail screen. The Component detail screen displays all components, or parts, associated with the specific work order. Select and tap on a component from the list to display its details.

### Actions for Components

Tap the *Actions* menu to see a list of available actions specific to the selected component.

- **Discard:** Discards, or deletes, the highlighted component
- **Edit:** Allows you to edit the highlighted component
- **Issue:** Begins the issue process for the highlighted component
- **Transmit:** Performs the transmit function

### 6.1.12.1 Adding a Component

#### Procedure

1. Tap the *Add* icon at the top right of the Components detail screen.  
The Add Component query displays.
2. Tap *Yes* to continue or *No* to exit out of the Add Component operation.  
The initial Add Component screen displays.
3. Use the drop-down fields to make your component additions and tap *Done*. If a required field is left blank, a message displays for that field. Tap *Finish* to return to the Component detail screen.

Some drop-down fields direct you to additional screens, depending on your configuration. These screens are not discussed in this user guide.

## Results

The new component is added to the bottom of the Components detail screen.

### 6.1.12.2 Issuing a Component

#### Procedure

1. From the work order main screen, select the *Components* tab.

The Component tab lists the component details for the selected work order.

2. Tap inside one of the component lines to open the main Components screen.
3. Select *Issue* from the *Actions* menu at the top of the screen. Note that the option is available only if the Stock Type is "L".

The Issue Component screen displays. Plant, Item, and Description are filled in and are read-only fields.

4. Select a *Location*.
5. Enter the *Quantity*, then tap *Done*.

## Results

You are returned to the main Components details screen. Note that you must perform a transmit for the component to be issued.

### 6.1.13 Work Order History Screen

To access the History detail screen, tap *More* at the bottom of the Work Order main screen, then tap *History* from the list displayed.

The criteria for work orders to display on this screen include:

- Work orders with a TECO (complete) status
- If the current work order has equipment or a functional location (FLOC)

Tap on an entry in the list to open the individual History detail screen for that work order.

## 6.1.14 Work Order Pending Screen

To access the Pending Work Orders Detail screen, tap **More** at the bottom of the Work Orders Main screen, then tap **Pending** from the list displayed. The Pending Work Orders Detail screen displays. The Pending option is hidden if no pending work orders exist for the current work order.

Tap on a work order from the list to see its individual details.

## 6.2 Notifications List Main Screen

The Notifications main screen displays a list of notifications in the system. To access the screen, select the [Notifications](#) option from the main Application menu screen.

On the Notifications list main screen, you can select a specific notification and view its details, create new notifications, or delete existing notifications. Select the Notifications screen by tapping on the [Notifications](#) navigation icon.

**Header pane:** Lists how many notifications are in the current viewable notification list

**Notification list:** Notifications currently saved on the client in list form. Each record on the list represents one notification.

**Actions menu:** Allows you to add a notification or transmit information back to SAP.

**Navigation icons:** Icons at the bottom of the screen allow you to access work orders, notifications, and time sheets.

### Viewing Notifications

Tap on a notification from the main screen to open its Notification detail screen.

### Notification Actions

The navigation icons along the bottom of the screen allow you to access the following screens, as applicable to the selected notification (if more than four options are available, the last icon will be [More](#), and you can tap on it to see additional choices). The icons are as follows:

- Notes
- Items
- Tasks
- Activities
- Pending

Tap on the [Actions](#) menu from the Notification detail screen to see the available actions for the selected notification. The menu list will vary, depending on the notification selected.

Highlight a notification in the list and tap *Actions* to display the actions available for that notification. If you do not see the action on your mobile device, that action is not available for the particular notification.

- Start a notification
- Complete a notification
- Edit a notification
- Add or edit notification notes
- Add a new notification
- Discard (delete) a notification
- Upload a picture or document
- Add a work order
- Geotag from map or geotag from current location

## 6.2.1 Notification Push

A user can receive a notification push when an administrator sends out an emergency work order or assignment. The user receives this on their mobile device without having to transmit to the back end or syncing their device.

The work order or assignment is automatically pushed to their device and a notification is triggered to alert the user that a new work order or assignment is available to them. This alert is configured by your administrator and could be a pop-up window, a ring tone, a vibration of the mobile device, or a combination of alerts to let you know that a high-priority work order was pushed to you.

To work with a notification push work order or assignment, follow the topics found in this section. Notification pushed work orders are the exact same as regularly transmitted work orders or assignments, except for how they are transmitted to you.

## 6.2.2 Adding a Notification

### Procedure

1. From the Notifications main screen, tap the *Actions* menu.
2. Select the *Add* option.

The initial Add Notification screen displays.

3. Use the drop-down lists to complete all fields. Tap *Finish*.

The Add Items screen displays.

4. Add a new item, as applicable, and tap *Finish* to continue.

The new notification is added to the bottom of the main Notifications screen

## 6.2.3 Starting a Notification

### Context

To start a notification, it must be in the *Received* state.

### Procedure

1. Select a notification from the Notifications list.
2. Tap the *Actions* menu and select *Start Notification*.

The status changes to *Started* and you can begin work in order to complete the notification.

## 6.2.4 Completing a Notification

### Procedure

1. Highlight a notification with a status of Started and tap the *Actions* menu at the bottom of the main Notifications screen.
2. Tap the *Complete* option. A confirmation screen displays asking if you want to complete the notification. Tap *Yes* to complete.

### Results

The notification changes to a *Notification Complete* status.

## 6.2.5 Editing A Notification

### Procedure

1. Highlight a notification with a status of Started and tap the *Actions* menu.
2. Tap the *Edit* option on the menu.  
The Edit Notification initial screen displays.
3. Use the drop-down lists to make any edits needed on this screen and tap *Next* to continue.

The Notes screen displays.

4. Add an optional note using the on-screen keyboard, then tap *Finish*.

## Results

The edits are made to the highlighted notification.

## 6.2.6 Adding a Note to A Notification

### Procedure

1. From the Notifications list screen, tap a notification to open the Notifications detail screen and then tap the *Notes* icon at the bottom of the screen.

The Notification Notes screen displays.

2. Tap the *Actions* menu on the Notes detail screen.
3. Select the *Add* menu option.  
The Add Note screen displays.
4. Add an applicable note using the on-screen keyboard and tap *Finish* when done.

## Results

The note is added to the notification.

## 6.2.7 Editing A Note on A Notification

### Procedure

1. From the Notifications main screen, tap a notification to open the Notification detail screen and then tap the *Notes* icon at the bottom of the screen.

The Notes Detail screen displays.

2. If notes already exist, highlight the desired note, and either select *Edit* from the *Actions* menu or tap the *Edit* icon at the top right of the screen.  
The Edit Note screen displays.
3. Use the on-screen keyboard to edit the existing note and tap *Finish* when done.

## Results

The edited note is saved to the notification.

## 6.3 Time List Main Screen

The Time screen displays a list of work dates. On this screen, you can select a specific work date and view its details or you can perform a transmit. Tap the *Time* navigation icon at the bottom of the screen to access the main Time screen.

**Column headers:** The column headers provide the name of the column. You can rearrange the column headers to change the order in which the columns are displayed. Use the horizontal scroll bar at the bottom of the time list pane to view all the columns. The column headers are:

- Work Date
- Day of Week
- Total Hours

**Time list:** The list of work dates currently saved on the client. Each record in the list represents one work date.

**Actions menu:** Allows you to view the selected record or perform a transmit.

**Navigation icons:** Allows you to go to the Work Orders main screen or the Notifications main screen.

### 6.3.1 Time Detail Action Buttons

Double-tap a *Time* entry row to bring up a Timesheet detail screen with additional actions not available on the main Time screen. From the Timesheet detail screen, you can:

- Tap the *Add* icon or *Add* from the *Actions* menu to add a new record
- Tap *Transmit* from the *Actions* menu to perform a transmit
- Tap *List* to close the Timesheet detail screen and return to the main Time screen

Tap the *Actions* menu while a specific time record is highlighted to display the actions available for that time record:

- **Edit:** Edits the highlighted time record
- **Delete:** Deletes the highlighted time record
- **ViewCATSRecord:** Views the full details of the highlighted time record

## 6.3.2 Adding a Time Record

### Context

When you need to record a new time entry for a time sheet, you will add a new time record using this procedure.

### Procedure

1. In the main Time list screen, double-tap an existing time line item.  
The Timesheet screen appears.
2. Tap the *Add* option from the *Actions* menu at the bottom of the screen.  
The Add Time screen displays.
3. Make your time sheet additions by using the drop-down menus. When done, tap *Finish*.

### Results

The new time sheet record is added to the Time detail screen.

# 7 Working with Linear Asset Management (LAM)

## 7.1 Linear Asset Management Overview

Linear Asset Management provides functions with which you can describe, display, and manage linear assets.

Linear assets are technical systems with a linear infrastructure whose condition and properties can vary from section to section (dynamic segmentation).

Examples of linear assets include:

- Pipelines
- Roads and railway tracks
- Overhead power lines and cables

You can 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. This enables you to monitor what condition your linear assets are in, identify where there is damage or a defect (using the start point, end point, and offset), and manage all types of maintenance tasks (planned, unplanned, and preventive).

From the mobile device, you can view linear data for the following:

- Order Headers
- Operations
- Notification Headers
- Items
- Equipment Details
- Equipment Characteristics
- Functional Locations
- Functional Location Characteristics

You can create or edit the following with linear data:

- New work orders
- New operations
- New notifications
- New items
- Measurement documents

## 7.2 Accessing and Editing Linear Data

You can access the linear data for a work order, operation, notification, item, equipment, or functional location through the [Linear](#) link on the applicable detail screen. If no linear data exists for the specific item, the link is not displayed on the screen.

Once you tap the [Linear](#) link, the linear data displays in a read-only screen. The Linear screen displays four sections of information, as applicable.

- **Point Location**
  - Start
  - End
  - Length
- **Marker** (this section does not 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

### Editing the Linear Data

Equipment and functional locations of LAM data are editable. However, you cannot get to the edit screens by clicking on a [Linear](#) hyperlink on a details screen. You must follow a different work flow to access the edit screens.

To edit a linear asset management object or a characteristic value located in an equipment in a work order, for instance, you would click on the [Equipment](#) hyperlink or icon, depending on the type of mobile device you have. From the Equipment detail screen, click on the [Classifications](#) tab, and then on the value you want to edit. When that value's detail screen appears, click the [Action](#) menu and select either [Edit Value](#) or [Edit LAM](#).

This same work flow applies for functional locations of LAM data.

# 8 Working with Inspection Rounds

## 8.1 Inspection Rounds Overview

### i Note

Inspection rounds is similar to, but not the same as, Rounds. While both are used to read measuring points on objects, Rounds uses entry lists to help you perform your work. For more information, see [Rounds \[page 74\]](#).

Inspection rounds have the following characteristics:

- An inspection round is planned, for example, once a week, once a day, or for each shift
- An inspection round is always completed within one day, or within one shift
- The duration of an inspection round includes the work and the round itself within one plant
- Work is done on different technical objects. The number of technical objects can vary, depending on the sequence and the time required.
- The work activities in an inspection round are similar and require the same tools, replacement parts, and qualifications
- You can assign an inspection round to either a work center or to a person
- Measuring points on an inspection round are displayed in an easy to use wizard format
- If required, the user can create measurement documents from the inspection round
- If follow up activities are necessary, the user can create notifications from the inspection round

An inspection round can involve the following objects:

- Functional locations
- Equipment
- Measuring points

The Inspection Rounds feature of the SAP Work Manager application allows you to accomplish the following:

- View inspection rounds
- View resources and tools for the rounds
- Record readings for all measuring points across the work order

## 8.2 Accessing Inspection Rounds Data

You can access the inspection rounds data either through the [PRT](#) (Production Resources or Tools) link on the [Detail](#) tab of the work order or through the [Record Points](#) option of the [Actions](#) menu.

If you use the PRT link, you will first access the Production Resources or Tools screen.

Any work order that contains resources or tools will have a PRT link on its Detail screen. Tap the link to open the Production Resources or Tools screen. This screen gives you access to up to four tabs of read-only information:

- **Tools**
  - Type
  - Tool
  - Quantity
  - Plant
  - Item
  - Text
- **Inspection Types**
  - Type
  - Total
- **Measuring Points** (only available if inspection rounds exist)
  - Point
  - Reading
  - Last
- **Attachments**
  - Type
  - Tool
  - Quantity
  - Plant
  - Item
  - Text

To go directly to the Inspection Rounds screen without opening the PRT screen, select the *Record Points* option from the *Actions* menu for the applicable work order.

A list of all measuring points is displayed. For each measuring point, the following information is displayed:

- **Measuring Point Details**
  - Point
  - UoM (unit of measure)
  - Description
  - Characteristic
  - Short Text
- **Current Reading**
  - Reading
  - Date
  - Valuation Code
  - Linear (a link to the Linear data screen)
- **Previous Reading**
  - Reading
  - Date
  - Valuation Code
  - Time
  - Linear (a link to the Linear data screen)
- **Limits**

- Upper
- Lower

## Taking Readings and Editing the Inspection Rounds Data

There are two ways to take readings and edit the inspection rounds data:

- Tap on the *Edit* icon to take a reading for the selected measuring point only
- Tap the *Ruler* icon on the measuring points list to open a wizard that allows you to take or skip readings for all measuring points.

Regardless of which edit option you choose, the Take Reading screen displays and allows you to enter readings for one or all the measuring points. The difference is that if you used the *Edit* icon, the Take Reading screen only allows you to take readings for the selected measuring point and if you used the *Ruler* icon, the Take Readings screen is a wizard that allows you to move through all the measuring points.

The Take Reading screen displays the following fields:

- Point (read-only field)
- Valuation Code
- Characteristic (read-only field)
- Reading
- Short Text
- Skip Reading (displayed only if you accessed this screen through the Ruler icon): Use this check box to skip this reading and continue to the next. When you reach the last measuring point, a pop-up displays asking if you want to confirm the operation. Tap *Yes* to move to the Operations screen (you are returned to the wizard when you are done with the confirmation).

# 9 Working with Maps

## 9.1 Maps Overview

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 asset, you get a full picture of that asset. 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.

### i Note

Full use and map features vary, depending on the selected geographic information system (GIS) vendor 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 vendor.

## Customizing Options for Your Maps

There are a number of ways you can customize your map view.

### i Note

These settings are defined in the back end, in the ConfigPanel by your administrator. If you do not have access to one or more of these options, it is because they have not been turned on by your administrator.

- Select the map radius for your map to be displayed in miles or kilometers
- Define the type of map to be used (Esri, Google, and so on)
- Display the maps while offline
- Select the map view (terrain, satellite, and so on)
- View a legend to identify the pin colors on the map

## Near Me Maps

“Near Me” maps allow you to view work orders, notifications, equipment, and functional locations on your map within a specified radius of your current location.

- **Work orders and notifications:** By default, your work orders, and notifications are displayed on your map. If you select orders Near Me, then only those orders within your defined radius are displayed. If you select notifications Near Me, then only those notifications within your defined radius are displayed. You also have the option of selecting both orders and notifications. Each is marked with its own pin. When you click a pin, a pop-up menu displays with various options, including going to the appropriate order or notification details screen.

- **Equipment and functional locations:** By default, the equipment, and FLOCs associated with your work orders or notifications are displayed on your map. If you select equipment Near Me, then only equipment within your defined radius is displayed. If you select functional locations Near Me, then only those functional locations within your defined radius are displayed. You also have the option of selecting both equipment and functional locations. Each is marked with its own pin. When you click a pin, a pop-up menu displays with various options, including going to the appropriate equipment or functional location details screen

## Map Search and Locate

Once you have done a general search for work orders, notifications, equipment, or functional locations, you can do a more detailed search to locate a specific item. Once you search on specific parameters, the system zooms in to the individual object or objects and highlights them.

**Work orders:** To use the detailed search function, you must first search for work orders and have the results displayed on your screen. Then, you can use the search option to search the displayed work orders based on one of the following search parameters:

- Order ID
- Order description
- Order priority
- order scheduled date

**Notifications:** To use the detailed search function, you must first search for notifications and have the results displayed on your screen. Then, you can use the search option to search the displayed notifications based on one of the following search parameters:

- Notif ID
- Notif description
- Notif priority
- Notif scheduled date

**Equipment:** To use the detailed search function, you must first search for equipment and have the results displayed on your screen. Then, you can use the search option to search the displayed equipment based on one of the following search parameters:

- Equipment ID
- Equipment description
- Equipment priority
- You can also enter criteria by scanning the bar code

**Functional location:** To use the detailed search function, you must first search for functional locations and have the results displayed on your screen. Then, you can use the search option to search the displayed functional locations based on one of the following search parameters:

- FuncLoc ID
- FuncLoc description
- FuncLoc category
- You can also enter criteria by scanning the bar code

**Search all:** If you have all work orders, notifications, equipment, and functional locations displayed on the map, use any of the search parameters to get your target results:

- Order ID
- Order description
- Order priority
- Order scheduled date
- Notif ID
- Notif description
- Notif priority
- Notif scheduled date
- Equipment ID
- Equipment description
- Equipment priority
- FuncLoc ID
- FuncLoc description
- FuncLoc category
- You can also enter criteria by scanning the bar code

## Actions that Can be Taken from the Map

You can perform the following actions directly from the map:

- **Create a work order:** You can create a work order when you select either an equipment pin or a functional location pin.
- **View work order details:** When you select a work order pin, you can see details such as order number, description, priority, and due date in the call out window. From the detailed call out window, you can then create a notification, view equipment, or view functional location.
- **Create a notification:** When you select either an equipment pin or a functional location pin, you can create a notification.
- **View notification details:** When you select a notification pin, you can see details such as notification number, description, priority, and due date in a call out window. From the detailed call out window, you can create an order, view equipment, or view functional location.
- **View functional location details:** When you select a functional location pin, you can see details such as functional location ID, description, and category description in a call out window. From the detailed call out window, you can create a notification, create a work order, view equipment, or create a measurement reading.
- **View driving directions:** You can view directions from your current location to the selected work order, notification, equipment, or functional location.
- **Adding or editing a geotag:** For more information, see the topic [Working with Geotags \[page 64\]](#).

## Additional Supported Features

Some additional features are also supported.

## i Note

These features, like the rest of GIS integration, require back end configuration by your system administrator.

The features include the following:

- **Feature layer support:** A layer is the equivalent to a legend item on a paper map. For example, on a road map, roads, national parks, political boundaries, and rivers could be considered different layers. The feature layer defines how the equipment, functional location, work orders, and notifications are symbolized on a map using geographical entities like points, lines, and polygons.
- **Offline support for base maps and feature layers:** Offline support for maps and layers in the mobile application enables you to view, collect, and update features and maps when disconnected from the Internet. Offline support enables your users to view all equipment, functional locations, work orders, and notifications on the map even in a disconnected mode.

## 9.1.1 Editing the Map

Users may need to add objects to the map as points, polylines, or polygons. Using the map edit function allows users to capture the object's area for transmission to the back end.

When you press the *Edit* icon, the existing map buttons disappear, and the point, polyline, and polygon buttons appear. Only one of the buttons can be selected at a time, and only one shape can be drawn per map edit.

To create a geotag, see the topic [Working with Geotags \[page 64\]](#).

When finished adding a geotag, click *Save*. At this point, a pop-up menu appears, asking you to choose which type of object you wish to associate the geotag with:

- Work order
- Notification
- Functional location
- Equipment

Or you can *Cancel* out and not associate the geotag with an object. You can also *Clear* the map points that you made.

If you choose to save the geotag with an object, that is passed to the SAP back end. The map will then be reloaded to display all business objects, and the newly created object will then be visible.

## 9.1.2 Working with Geotags

Geotags can tell users the location of the content of a given work order or assignment, and also show the work order or assignment relevant to a given location.

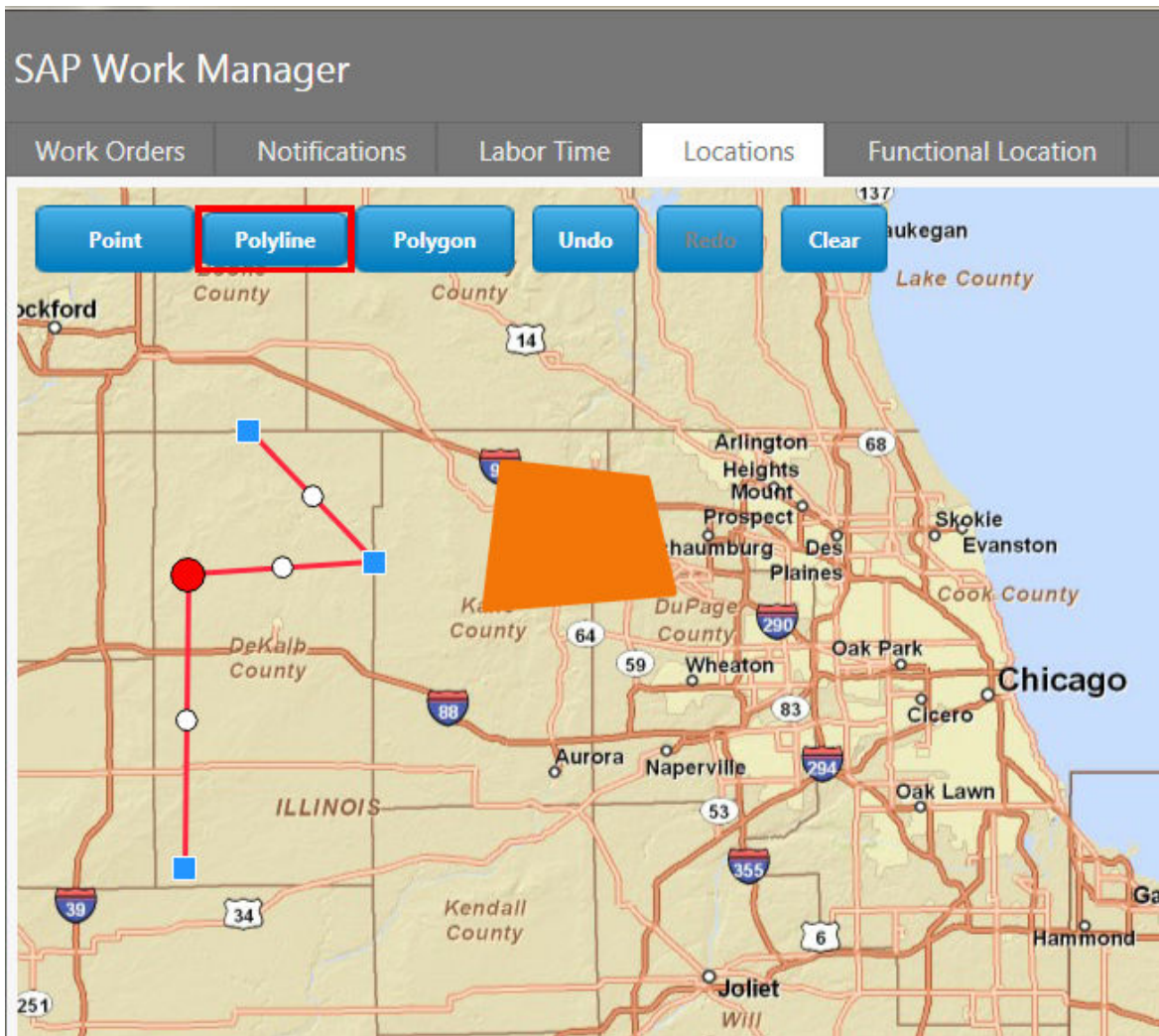
From the *Details* menu of the following objects, you can choose either *GeoTag from Map* or *GeoTag from Current Location*:

- Work Orders

- Notifications
- Equipment
- Functional Locations

Geotag features include:

- **Points:** A point is a map feature that represents a single location with no length or area. Each point can indicate a work order or a notification within a given scale on the map.
- **Polylines:** A polyline is a digital map feature that represents a location or items that has length but no area at a given scale. Each point can represent either equipment, functional location, work order, or notification within a given scale on the map.
- **Polygons:** A polygon is a map feature that displays a multi-sided figure that represents an area on the map. It is an aerial view of a boundary defined by the arcs. Every polygon contains one label point inside its boundary. Each point can represent either equipment, functional location, work order, or notification within a given scale on the map. *An example of points, polylines, and polygons*



Selecting *GeoTag from Current Location*, quickly geocodes the current location as a point without switching to the *Locations* tab and requiring you to input a point, polyline, or polygon, and saving it.

## i Note

You must be using a device with an active GPS enabled to use this menu function.

Choosing *GeoTag from Map* opens the *Locations* tab, where you can edit existing geotags or add a new geotag and save it.

## Adding a Geotag

1. To add a geotag to a work order, notification, equipment, or a functional location that does not already have a geotag attached to it, click on the object, click the *Details* menu and select *GeoTag from Map*. The *Locations* screen will display.
2. Depending on how your administrator has configured your GIS (geographic information system), you can add a point, a polyline, or a polygon, to a map that may have been customized for your work environment. Click on the button for the type of object you want to add (automatically set to *Point*), and then click on the spot on the map where you want to add the new geotag.
3. If you are adding a multi-point object, such as a polyline or a polygon, click multiple times until you get the polyline length you want or the polygon shape you need. You can stretch or adjust the polyline or polygon to add more points or expand it as necessary.

## i Note

If at any point in creating your geotag you make a mistake, you can click *Undo* to undo the last step. You can click *Undo* for multiple steps.

4. When satisfied, click *Save*. To start over, click *Clear* and begin again. To not save any changes and return to the previous object's details screen, click *Cancel*.

## Editing a Geotag

If there already is a geotag attached to an object, you can edit that geotag, by either changing it to a different type of geotag or by moving it to a different location on your map.

1. From any one of the four object's *Detail's* menus, click *GeoTag from Map*. The *Locations* screen will display.
2. To change from one geotag object to another geotag object, for example, from a polygon to a point, first select *Point* from the buttons on the map. Then, place the point where desired on the map and click *Save*. The *Add/Edit Work Order* screen appears. Make any changes necessary and click *Next*. You are then returned to the object's detail screen.
3. To move a geotag to another location, first select that geotag's button, for example, select the *Polygon* button to move an existing polygon from one place on a map to another place. Then redraw the polygon in the appropriate place and click *Save*. The *Add/Edit Work Order* screen appears. Make any changes necessary and click *Next*. You are returned to the object's detail screen.
4. To confirm your changes, click on the *Locations* tab from the object's detail screen and ensure that the new geotag or the new geotag's location is correct.

## Deleting a Geotag

Once you create a geotag, save it, and leave the [Locations](#) tab, there is no way to delete a created geotag from the client. Be sure you need to create the geotag before saving the geotag and leaving the [Locations](#) tab. However, a geotag can be deleted from the back end by an administrator upon request, and will disappear from your device upon your next transmit.

## 9.1.3 Creating and Using Offline (Cached) Maps

If you spend time to cache maps that you use frequently at the zoom and layer level you use often while you are online, you can then use these maps while you are offline.

### Procedure

1. Zoom and pan the map to the desired area that you want to cache
2. Click the [Settings](#) icon, and then select the [Offline](#) section.
3. Select the [Basemap](#) to be cached.
4. Select the [Feature Layers](#) you want to cache.
5. Select the [Zoom Level](#). The slider is already positioned to the current level. Note that the higher the zoom level, the larger the cache size.
6. Select the [Cache](#) button to save the map images.

### Results

When network connectivity is lost, you will be prompted to use your offline cached maps that you have created. Alternatively, even if you are online, you can use your cached maps by selecting the [Link](#) icon.

# 10 SAP Work Manager with Meter Management

## 10.1 Meter Management Component Overview

The meter management component gives technicians access to SAP through a mobile device, with or without network access. Using the meter management component, technicians can retrieve work orders assigned to them from the SAP system. The meter management component allows technicians to complete the following tasks:

- Meter installation
- Meter removal or replacement
- Aperiodic readings
- Meter repair
- Plant maintenance

### i Note

Once the meter management component has been imported into the base SAP Work Manager application, the following limitations are enforced:

- Only plant maintenance type work orders can be added.
- Only plant maintenance type notifications can be added.
- When adding a work order from a notification, only plant maintenance type notifications are allowed to add a work order if there is no existing work order.
- When adding a notification from a work order, only plant maintenance type work orders are allowed to add multiple notifications.

## 10.2 Installing a Meter

### Context

Work orders with a type of `SM01` indicate a new meter installation. The Meter Management component must be installed with SAP Work Manager to handle these types of work orders.

## Procedure

1. Open the Work Orders main list screen.  
A partial set of details for the work order displays.
2. Tap a work order with a type of SM01.  
The Work Order detail screen displays for the selected work order.
3. Tap *Actions* to open the Actions menu.  
The menu list of actions for the work order displays.
4. Tap *Meter* to display the Meter detail screen for the selected work order.  
The Meter Details screen displays for the selected work order.
5. Tap *Actions* again.  
A new Action menu list displays, with meter-specific options.
6. Tap *Install*.  
The Meter Installation screen displays.
7. Complete all fields on the screen. Scroll down to see all fields. Tap *Finish* to continue.  
A prompt displays asking if you want to take a reading.
8. Select *Yes* or *No* to enter an initial meter reading. If you tap *Yes*, a Meter Reading screen is displayed and you must enter the current reading. Tap *Finish* when done.  
The Meter Detail screen displays, listing the meter status as Installed.

## Results

Once the device is marked as Installed, you can then continue to address other sub-operations of the work order, if there are any. When ready, you can complete the work order as you would any other work order.

## 10.3 Removing or Replacing a Meter

### Context

Work orders with a type of RP01 indicate a device removal or replacement. The Meter Management component must be installed with SAP Work Manager to handle these types of work orders.

#### i Note

When you replace a device, it is the same as performing a removal and then an installation. Therefore the screens you see will be a combination of this topic and [Installing a Meter \[page 68\]](#).

## Procedure

1. Open the Work Orders main list screen.

A partial set of details for the work order displays.

2. Tap a work order with a type of RP01.

The Work Order detail screen displays for the selected work order.

3. Tap *Actions* to open the Actions menu.

The menu list of actions for the work order displays.

4. Tap *Meter* to display the Meter details.

The Meter Details screen displays for the selected work order.

5. Tap *Actions* again.

A new Action menu list displays, with meter-specific options.

6. Tap *Replace* to replace a device, or tap *Remove* to remove a device without replacing it.

The Meter Removal screen displays.

7. Select a *Reason* from the drop-down list of options. Note that the Activity Dt (date) defaults to the current date and the other fields on the screen are pre-populated by the work order and cannot be modified. Select the *Movement* from the drop-down list and then select the *Plant*, *Storage*, and *Cost Center*, as applicable. Note that the Serial, Material, and Group fields are already filled in based on your choices on the previous screen and cannot be modified. Tap the right arrow to continue.

### Note

If you selected *Remove* in *Step 6*, you will be prompted at this point to take a final meter reading. You are then taken back to the Meter Details screen, where the status is listed as Removed, and you are done with the meter removal. If you selected *Replace* in *Step 6*, continue with the rest of the steps in this section.

The Meter Installation screen displays.

8. Select the serial number (a secondary screen displays, select from the list and tap *Done*). Your Serial selection populates the Material and Register fields. Then, select a *Movement* from the drop-down list and select *Plant*, *Storage*, and *Cost Center*, as applicable. Tap *Finish* to continue.

A prompt is displayed asking if you want to take a reading of the new meter.

9. Select *Yes* or *No* to take an initial reading. If you tap *Yes*, a Meter Reading screen is displayed and you must enter the current reading and tap *OK*.

The Meter Details screen displays again, with the meter status marked as Replaced.

## Results

Once you have replaced or removed the device, you can then continue to address other sub-operations of the work order, if there are any. When ready, you can complete the work order as you would any other work order.

## 10.4 Disconnecting or Reconnecting a Meter

Work orders with a type of DC01 or RC01 indicate a meter disconnection or reconnection. The Meter Management component must be installed with SAP Work Manager to handle this type of work order.

### Procedure

1. With the main Work Orders list pane open, highlight a work order with a type of either RC01 (reconnect) or DC01 (disconnect).

The details for the work order display in the details pane.

2. Tap the *Actions* menu and select *Document Activities*.

The Document screen appears, displaying the activities to be accomplished to either connect or disconnect the meter, and the list of meters to read before the chosen meter can be connected or disconnected.

3. Tap the *Action* menu and select either *Meter Connect* or *Meter Disconnect*, depending on which meter type you have selected.

The Document Activity Status Change screen or Meter Status Change displays, depending on your device.

4. You must select a *Status*. The *Date* and *Time* are automatically populated with the current date and time but can be changed. Click *Next*, or *Done*, depending on your device, when done to continue.

The Meter Reading screen displays.

#### i Note

If you have chosen meter type DC01, you must perform meter readings and cannot skip the next step.

5. Complete all fields and click *Done*.

The Meter Reading screen will loop through until all meters are read for the selected meter.

### Results

After the selected meter is connected or disconnected, you are returned to the Document screen with the *Status* field showing a Confirmed disconnected or reconnected status, depending on the type of meter you chose.

## 10.5 Taking an Aperiodic Meter Reading

### Context

Work orders with a type of `MR01` indicate an aperiodic reading is required. The Meter Management component must be installed with SAP Work Manager to handle these types of work orders.

### Procedure

1. Open the Work Orders main list screen.  
A partial set of details for the work order displays.
2. Tap a work order with a type of `MR01`.  
The Work Order detail screen displays for the selected work order.
3. Tap *Actions* to open the Actions menu.  
The menu list of actions for the work order displays.
4. Tap *Meter* to display the Meter details.  
The Meter Details screen displays for the selected work order.
5. Tap *Actions* again.  
A new Action menu list displays, with meter-specific options.
6. Tap *ReadAll*.  
The Meter Reading screen displays.
7. Enter the *Reading* and optionally add a *Note*. Select a *Reason* from the drop-down list. Tap the green check mark to finish.  
The Meter detail screen displays again, with the meter status of Reading Done.

### Results

Once you have recorded the aperiodic reading, you can then continue to address other sub-operations of the work order, if there are any. When ready, you can complete the work order as you would any other work order.

## 10.6 Repairing a Meter

### Context

Work orders with a type of SM02 indicate a device repair is required. The Meter Management component must be installed with SAP Work Manager to handle these types of work orders. Once the repair work has been completed on the device, take the following steps to complete the work order.

### Procedure

1. Open the Work Orders main list screen.

A partial set of details for the work order displays.

2. Tap a work order with a type of SM02.

The Work Order detail screen displays for the selected work order.

3. Tap *Actions* to open the Actions menu.

The menu list of actions for the work order displays.

4. Tap *TECO*. Note that if you want to enter a final meter reading before you close out the work order, tap *Meter*, and take the normal steps to enter a meter reading, then come back to this screen and tap *TECO*.

The TECO WO (Work Order) screen displays.

5. Tap inside the *Notes* field. A separate screen displays for you to enter your notes regarding the device repair. When you have finished your notes using the on-screen keyboard, tap *OK* to return to the TECO work order screen. Tap the right arrow to continue.

The Add Time screen displays.

6. Enter the hours (any non-zero amount), and all applicable fields on the Add Time screen and tap the green checkmark to finish.

The Meter detail screen displays again, with TECO added to the end of the Type. Note that when you go back to the Work Order main list screen, the work order status is also marked as TECO.

### Results

Once you have marked the work order as complete (TECO), you will need to perform a transmit to make sure the latest information is uploaded to the SAP system.

# 11 SAP Work Manager with Rounds

## 11.1 Rounds

The Rounds component is integrated with the SAP Work Manager application, and groups measuring points together.

### Use

Rounds lets you enter measuring points. In SAP ERP, a measuring point is assigned to either an entry list, a functional location, or a piece of equipment. Each entry list, functional location, or piece of equipment can have one, two, or multiple measuring points. Rounds retrieves the collection of measuring points assigned to an entry list, functional location, or piece of equipment and presents them so you can enter readings for one or more of the measuring points in the collection. You can also retrieve individual measuring points to take their readings. Each collection is assigned a unique name and is displayed under the Rounds Detail screen in the SAP Work Manager application.

### Overview

#### i Note

Rounds is similar to, but not the same as, Inspection Rounds. While both are used to read measuring points on objects, Inspection Rounds does not use entry lists. For more information on Inspection Rounds, see [Inspection Rounds Overview \[page 58\]](#).

When you download either an entry list or a single measuring point, you are given all the information you need for that entry list or point. The information you are given includes the equipment number, unit of measure, upper and lower limits for the measuring point, and any measurement history. You can perform your rounds by moving down your entry list, taking each reading, and recording any observations as you go.

You can highlight each round to display its associated measuring points. You can then select any measuring point of the selected round to perform various actions, such as viewing the details of the measuring point, recording a reading, or adding a new notification.

Details of the measuring point may contain its description, its sequence (or stop number) in the route, its previous reading, date and inspector, and its unit of measure. For condition monitoring points, upper and lower limits may be displayed. A list of historical readings for the meter or point are also available for you to review.

Guided by predefined limits and parameters, Rounds allows you to enter an appropriate reading or observation for each measuring point. Finally, you can insert a pertinent note to accompany the reading or observation.

After SAP Work Manager client synchronizes with SAP Mobile Platform, the measuring points are updated in SAP ERP with the data that you entered in your client device.

## 11.2 Rounds Detail Screen Overview

The Rounds Detail screen is the main screen for Rounds and is always the first one displayed when you tap the Rounds icon using SAP Work Manager. The Rounds Detail screen lists all the measurement points based on the criteria you specify during the Measurement Point Selection wizard.

Each record in the list represents a group of one or more related measurement points. Round record types on this screen can be either actual rounds as configured in SAP ERP or pseudo-round headers that represent either an functional location, equipment, or individual measurement point using the Measurement Point Selection wizard.

Using the Measurement Point Selection wizard, select points from a main list of all available points on the client. These selected points are then added to a rounds list. From this rounds list, you can select a point and perform various actions on it. Actions include viewing the details of the individual point, recording a reading for that point, or adding a new notification to SAP ERP for the functional location or equipment to which the point belongs.

Additionally, you can also view the historic readings for the point, and once you have recorded the reading of the point, you can optionally enter a note. Once the readings are recorded, this information is updated to SAP ERP during the next transmit.

The navigation icons allow you to switch between work orders, rounds, and any other add-on components that may be installed on your client.


Tap the arrow icon () and select *Add* from the menu to start the Measurement Point Selection wizard.

## 11.3 Using the Measuring Point Selection Wizard

### Context

When you first view the Rounds detail screen in SAP Work Manager, the rounds list is empty. The list is empty because you must retrieve the measuring points from SAP ERP. Enter your election criteria into the Measuring Point Selection wizard to look for the measuring points you need for your rounds list.

### Procedure

1. Tap the *Rounds* icon to access the Rounds Detail screen in SAP Work Manager.
2. Tap the arrow icon () and select *Add* from the menu.

The Measuring Point Selection wizard displays.

3. Select either *Entry List*, *Functional Location*, *Equipment*, or *Individual Measuring Points* to continue. Tap *Next* at the top right of your device.
4. Depending on what you choose, follow the wizard and make your selections, using the search functions as needed. Tap *Finish* when complete.

The measuring point or points that match your criteria are retrieved. You are returned to the Rounds Detail screen where the rounds list is now displayed for you.

## Results

Tap a measuring point to begin work on it by following the topics in this section. Or tap on a measuring point to view its details.

## Next Steps

See the topics in this section for specific procedures on how to search for measuring points by entry list, functional location, equipment, or an individual measuring point.

### 11.3.1 Selecting Measuring Points by Entry List

#### Procedure

1. From the Rounds Detail screen, tap the arrow icon () and select *Add* from the menu.

The Measuring Point Selection wizard displays.

2. In the Search for Measuring Points By selection screen, tap *Entry List* and tap *Next* to continue.

The Add Entry List screen displays.


3. Tap in the `<Entry List ID>` field to bring up a searchable list of entry lists. Find and tap your desired entry list and tap *Done* to return to the Add Entry List screen.
4. Tap *Finish*.

## Results

You are returned to the Rounds Detail screen, with the round added to the Entry List. You can now select the round and view the measuring point details and record readings for the points associated with the round.

## 11.3.2 Selecting Measuring Points by Functional Location

### Procedure


1. From the Rounds Detail screen, tap the arrow icon () and select *Add* from the menu.  
The Measuring Point Selection wizard displays.
2. In the Search for Measuring Points By selection screen, tap *Functional Location* and tap *Next* to continue.  
The Add Entry List screen displays.
3. Tap in the `<Functional Location>` field to bring up a searchable list of functional locations. Find and tap your desired functional location and tap *Done* to return to the Add Entry List screen.  
The Functional Location is added and an Entry List local ID is automatically populated for your new entry list.
4. Tap in the `<Entry List Name>` field and give your new entry list a descriptive name. The Entry List Name field is required.
5. Optionally, tap in the `<Description>` field and type in a short description for your new functional location entry list.
6. Tap *Finish* when complete.

### Results

You are returned to the Rounds Detail screen, with the functional location and its measuring points added to the Entry List. You can now select the entry and view the measuring point details and record readings for the points associated with the functional location.

## 11.3.3 Selecting Measuring Points by Equipment


### Procedure

1. From the Rounds Detail screen, tap the arrow icon () and select *Add* from the menu.  
The Measuring Point Selection wizard displays.
2. In the Search for Measuring Points By selection screen, tap *Equipment* and tap *Next* to continue.  
The Add Entry List screen displays.
3. Tap in the `<Equipment>` field to bring up a searchable list of equipment. Find and tap your desired equipment and tap *Done* to return to the Add Entry List screen.  
The Equipment is added and an Entry List local ID is automatically populated for your new entry list.
4. Tap in the `<Entry List Name>` field and give your new entry list a descriptive name. The *Entry List Name* field is required.

5. Optionally, tap in the <Description> field and type in a short description for your new equipment entry list.
6. Tap *Finish* when complete.

## 11.3.4 Selecting Individual Measuring Points

### Procedure

1. From the Rounds Detail screen, tap the arrow icon () and select *Add* from the menu.  
The Measuring Point Selection wizard displays.
2. In the Search for Measuring Points By selection screen, tap *Individual Measuring Points* and tap *Next* to continue.  
The Add Entry List screen displays.
3. Tap in the <Measuring Point> field to bring up a searchable list of measuring points. Find and tap your desired measuring point and tap *Done* to return to the Add Entry List screen.  
The Measuring Point is added to the *Measuring Point* field.
4. You can either create a new entry list for your measuring point, or select an existing entry list to which to add your new measuring point:

New Entry List	Existing Entry List
Check the <i>Create New Entry List</i> checkbox.	Scroll through the existing entry list choices.
Tap in the <i>Entry List Name</i> field to give your new measuring point a descriptive name.	Highlight and tap your choice.
Optionally, tap in the <i>Description</i> field to give the measuring point a description.	
Tap <i>Finish</i> when complete.	Tap <i>Finish</i> when complete.


## 11.3.5 Discarding an Entry List

### Context

You can remove a round entry from the Entry List. Removing a round does not permanently remove it from your client device. However, if you have taken any readings on any measurement points and have not transmitted to the back end, you will lose those readings if you discard the round before transmitting.

You can add any round you have previously discarded back to the Entry List by using the Measurement Point Selection wizard.

## Procedure

1. From the Rounds Detail screen, find and highlight the round you want to delete.
2. Tap the arrow icon () and select *Discard* from the menu.  
A popup window displays, asking if you are sure that you want to discard the round.
3. Tap *Yes* to confirm and discard the round.

## Results

The round is removed from the Entry List.

## 11.4 Individual Measuring Point Detail Screens

Individual points detail screens are available from the main Points Detail screen. The individual points detail screen offers more information about the point.

To access the individual point detail screen, tap the *Rounds* icon to enter the Rounds Detail screen. Then, tap a round from the Entry List to highlight it. Select an individual measuring point from the list of points in the round and tap it. The individual Point Detail screen displays.

Here, you can view the following details about the measuring point:

- **Point:** Unique ID of the point
- **UOM:** Unit of Measure of the point
- **Description:** Short description of the point
- **Status:** Current status of the point
- **Obligatory:** Reading the point is mandatory. You cannot skip reading the point.
- **FuncLoc:** The functional location ID of the point
- **Equipment:** The equipment ID of the point
- **Characteristic:** Represent the specifications of the object (functional location or equipment)
- **Position:** Text or descriptive number to identify the measuring point position
- **Short Text:** Brief description of the *Position* identifier
- **History:** If a hyperlink, the measuring point has a history of measurements. Tap *History* to access and view the measurement document history.
- **Notifications:** If a hyperlink, the measuring point has notifications associated with it. Tap *Notifications* to access and view the notifications.
- **Overflow:**
- **Reverse Counter:** If checked, continuous reading is recorded for the measuring point, backwards

Tap the *Readings* button to see the following details about the readings on the measuring point:

- **Point:** Unique ID of the point

- **UOM:** Unit of Measure of the point
- **Description:** Short description of the point
- **Characteristic:** Represents the specifications of the object (functional location or equipment)
- **Short Text:** Short description of the measurement document
- **Current Reading**
  - **Reading:** Current reading
  - **Date:** Date of the current reading
  - **Valuation Code:** Used if measurement is qualitative. For example, you are answering a *YES* or *NO* question about the object you are measuring. Your site can implement other custom qualitative options for the field, such as *EMPTY / FULL*, *TRUE / FALSE*, or site-specific answers.
  - **Read By:** User ID of the technician who took the measuring point reading
  - **Short Text:** Observations about the measuring point taken during the reading
  - **Difference:** Difference in value from previous reading and current reading
- **Previous Reading**
  - **Reading:** Value of the reading that was last transmitted
  - **Date:** Date of the reading that was last transmitted
  - **Valuation Code:** Value of the reading that was last transmitted, if the reading uses a valuation code
  - **Read By:** User ID of the technician who took the measuring point reading that was last transmitted
  - **Short Text:** Observations, if any, of the reading that was last transmitted

To read a rounds list or a single measuring point, see the topic [Reading Measuring Points \[page 80\]](#).


## 11.5 Reading Measuring Points

You can read an entire round list or select a single measuring point in a list and read it, based on your schedule.

### i Note

If a measuring point is marked as *Obligatory* on the *Details* screen, you must read the measuring point and cannot mark the *Skip Reading* checkbox.


### Reading a Single Measuring Point

1. Highlight and tap on a measuring point on an entry list.  
The Point Detail screen displays.
2. Tap the pencil icon () , either from the individual measuring point *Details* tab or *Readings* tab.  
The Read Point screen displays.
3. View the *Read Point* screen. Note that the *Point Details* section is read only.
4. Look at the *Reading* section. There are three actions you can take here, though not all fields may be enabled for every measuring point:

1. Tap the *Skip Reading* checkbox to skip reading the measuring point entirely. Note you cannot check this box if the measuring point is marked *Obligatory*. If you check the box, all other fields on the *Read Point* screen are disabled. Tap *Finish* to return to the Entry List.
2. Tap the *Text Only* checkbox. Checking this box disables the *Valuation Code* section. However, you can still enter a measuring point reading.
3. Tap the *Reading* field and enter your measuring point reading, based on the parameters in the *Point Details* section.
5. If the *Valuation Code* section is disabled, and you want to note an issue with the equipment or functional location of the measuring point, you can use the *Short Text* section to add a short note about the object.
6. The *Valuation Code* section fields may or may not be active. If they are active, and you notice a problem with the equipment or the functional location your measuring point is on, you can use the fields to notify your site of the issue. Tap in the *<Code>* field and determine the issue associated with the object. If the issue precludes you from taking a reading on the measuring point, mark the *No Reading* checkbox. Marking the checkbox disables all other fields except for the fields in the *Valuation Code* section.



### Note

If you enter a valuation code on a measuring point, consider creating a notification for the equipment or functional location as well. See [Adding a Local Notification \[page 82\]](#) for more information.

7. Tap *Finish* when you are done with your selections.  
You are returned to the Points List. Here, you can see which points are read, as they have a checkmark icon next to them. The measuring points that you skipped have an icon by them that looks similar to this: 
8. Transmit to the back end. If you discard an entry list where you have made measuring point readings before you transmit, all readings are lost.

## Reading an Entire Entry List

When reading an entire entry list, follow the procedure found in the section *Reading a Single Measuring Point*, starting at *Step 3*, to read the measuring points in the entry list. Use the procedure found in this section to navigate through the entry list and to understand how an entry list works when reading measuring points.

1. Highlight and tap on a measuring point on an entry list.  
The Point Detail screen displays.
2. From the Points List, tap the arrow icon () and select *Read All*.  
The Read Point screen of the first point in the Points List displays.
3. Read the point, following the procedure in the *Reading a Single Measuring Point* section, starting at *Step 3*.
4. To move to the next measuring point on the list, tap *Next*. Or, to exit out of the *Read Point* screens and defer reading measuring points for a later time, tap *Finish*.  
If you tapped *Next*, the Read Point screen displays for the next point on the Points List screen. Continue to read measuring points until you are complete. If you tapped *Finish*, you are exited out of the Read Point screen and returned to the Measuring Points Detail screen.
5. If you exited out of reading the measuring points, you can always tap the arrow icon on the Points List and select *Read All* to continue your measuring point reading.  
When the all the measuring points on the list are read, you are automatically returned to the Points Detail screen. Here, you can see which points are read, as they have a checkmark icon next to them. The measuring points that you skipped have an icon by them that looks similar to this: 

6. Transmit to the back end. If you discard an entry list where you have made measuring point readings before you transmit, all readings are lost.


## 11.6 Adding a Local Notification

When performing your measuring point readings, you may discover a maintenance issue on a piece of equipment or a functional location. Add a notification the moment you spot the issue.

### Context

Note that even though you are starting the creation of the notification through a measuring point detail screen, the notification is not linked to the measuring point once you transmit to the back end. The notification is linked to an equipment or a functional location only. However, before you transmit, you can see any notifications you have created through the specifying measuring point by tapping on the [Notifications](#) link.

### Procedure

1. Tap the [Rounds](#) icon to enter the Rounds Detail screen.
2. Tap a round from the Entry List to access the list of measuring points for the round.
3. Find the measuring point on the round list to measure. Highlight and tap it to access its detail screen.
4. To perform a reading on the measuring point, see the procedure [Reading Measuring Points \[page 80\]](#). If, while performing that reading, you notice an issue with the equipment or the functional location, finish the reading to return to the detail screen of the measuring point. Continue to the next step.
5. Tap the [Arrow](#) icon () and select [Add Notification](#) from the menu.  
The Add Notification screen displays.
6. Fill out all fields by tapping in the fields and using the on-screen keyboard. If the equipment or functional location is broken, ensure that the [<Is Broken>](#) checkbox is checked. Tap [Finish](#) when done.

### Results

The notification is saved to locally to your client device. You can tap the [Notifications](#) link to view the notification. Be sure to transmit to the back end.

# 12 SAP Work Manager with Crew Management

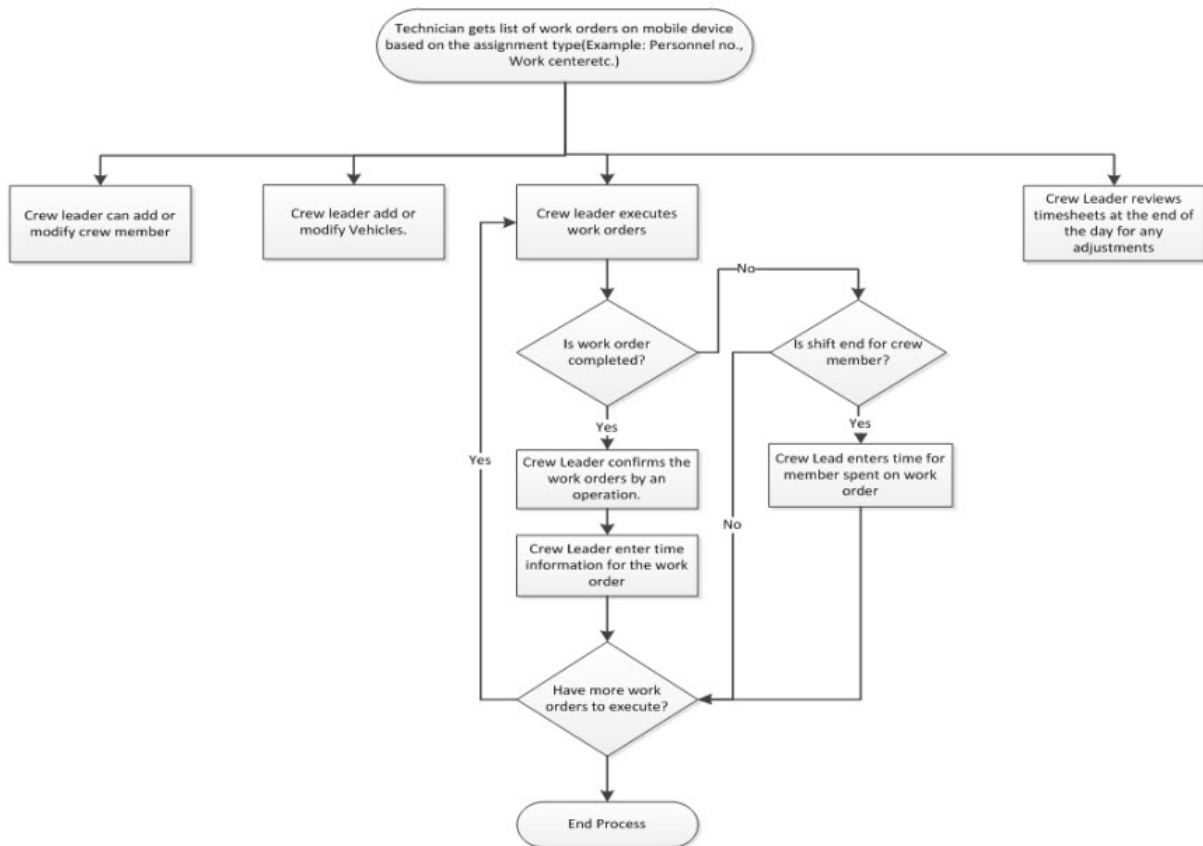
## 12.1 SAP Work Manager with Crew Management

The Crew Management add-on component for SAP Work Manager is an optional component that allows supervisors and team leaders to manage their crew with significantly lower cost and improved flexibility.

When the Crew Management add-on component is implemented, it adds the following functionality to the core SAP Work Manager application:

- Add, remove, and select crew technicians
- Add, remove, and select vehicles
- Track vehicle usage through vehicle odometer readings
- Report, review, and approve time for crew

The following diagram is a sample of the workflow for crew management.



## 12.2 Adding Crew Members

### Context

There are a number of ways to access the Add Crew screens. The procedure below takes you through the most common way to add one or more crew members. The crew management component must be installed with SAP Work Manager to give you access to this option. When it is installed, you will see the crew management option on the main SAP Work Manager screen.

### Procedure

1. From the main screen, tap *Crew Management*.

The Crew Management main screen displays.

2. There are several ways to access the Add Crew screen. You can select *Add Crew* from the *Action* menu, or you can tap the *Add Crew* button from the Crew Management main screen, or you can tap the *Add* button while you are viewing the Crew Members detail screen. From any of these options, the initial Add Crew screen displays.
3. Select the member you want to add and tap *OK*.

The second Add Crew screen displays.

4. If the name displayed is the one you want to add to the crew, tap the right arrow to continue. If that is not the correct person, tap the icon to the right of the name to go back to the list of names and make your selection again.

The following prompt is displayed: `Do you want to add another member to your crew?`

5. To add another crew member, tap *Yes* to go back to the list of names and select another name. If you are finished adding crew members, tap *No*.

You are returned to the Crew Management screen. The crew members number is adjusted to reflect the new total number of crew members.

### Results

The crew members total is updated to reflect the new addition(s) and the new member(s) you added are now listed on the Crew Members detail screen.

### Next Steps

You can complete other crew management tasks, as necessary, or you can return to the main Work Manager options screen and continue with other tasks.

## 12.3 Deleting Crew Members

### Context

To delete a crew member, you must be on the Crew Members detail screen. From there, you will be able to select one or more members to delete from the list. The crew management component must be installed with SAP Work Manager to give you access to this option. When it is installed, you will see the crew management option on the main Work Manager screen.

### Procedure

1. From the main screen, tap *Crew Management*.

The Crew Management main screen displays.

2. Tap the > icon to the right of Crew Members to view the list of crew members.

The Crew Members list screen displays.

3. Tap to highlight one or more crew members on the list.

The available option buttons become enabled at the bottom of the screen.

4. Tap *Delete*.

The following message displays: Member(s) will be removed from the crew list. Any existing time entries for member(s) will remain.

5. Tap *OK* to continue.

A second confirmation prompt displays, asking if you want to add time for the members you are about to delete.

6. To enter time for a crew member before removal from the crew list, tap *Yes* and the Add Time screen displays. To continue without adding time, tap *No*.

When you have finished with the crew member removal, you are returned to the Crew Members list screen.

### Results

The member(s) you selected are gone from the list on the Crew Members list screen and the number of crew members is adjusted to reflect the new total number.

### Next Steps

You can complete other crew management tasks, as necessary, or you can return to the main Work Manager options screen and continue with other tasks.

## 12.4 Adding a Crew Vehicle

### Context

There are a number of ways to access the Add Vehicle screens. The procedure below takes you through the most common way to add one or more vehicles. The crew management component must be installed with SAP Work Manager to give you access to this option. When it is installed, you will see the Crew Management option on the main Work Manager screen.

### Procedure

1. From the main screen, tap *Crew Management*.

The Crew Management main screen displays.

2. There are several ways to access the Add Vehicle screen. You can select *Add Vehicle* from the *Action* menu, or you can tap the *Add Vehicle* button from the Crew Management main screen, or you can tap the *Add* option from the *Action* menu while you are viewing the Vehicles detail screen. From any option, the initial Add Vehicle screen displays.
3. Select the vehicle you want to add and tap *OK*.

The second Add Vehicle screen displays.

4. If the vehicle information displayed is the correct for the vehicle you want to add, tap the green checkmark to finish. If it is not the correct vehicle, tap the icon to the right of the vehicle number to go back to the list of vehicles and make your selection again.

You are returned to the Crew Management main screen.

### Results

The vehicles total is updated to reflect the new addition(s), and the new vehicle(s) you added are now listed on the Vehicles detail screen.

### Next Steps

You can complete other crew management tasks as necessary, or you can return to the main Work Manager options screen and continue with other tasks.

## 12.5 Deleting Crew Vehicles

### Context

To delete a vehicle, you must be on the Vehicles detail screen. From there, you will be able to select one or more vehicles to delete from the list. The Crew Management component must be installed with SAP Work Manager to give you access to this option. When it is installed, you will see the Crew Management option on the main Work Manager screen.

### Procedure

1. From the main screen, tap *Crew Management*.

The Crew Management main screen displays.

2. Tap the > icon to the right of Vehicles to view the list of vehicles.

The Vehicles detail list screen displays.

3. Tap to highlight one or more vehicles on the list.

The available Action options become available on the Action menu.

4. Tap the *Delete* option on the *Action* menu.

The message displays: `Are you sure you want to remove this vehicle?`

5. Tap *Yes* to continue. If you tap *No*, you are returned to the Vehicles detail list screen.

A second confirmation prompt displays, asking if you want to take an odometer reading for the vehicle you are about to delete.

6. To enter an odometer reading before removal from the vehicle list, tap *Yes* and the Odometer Reading screen displays. To continue without adding a reading, tap *No*.

When you have finished with the vehicle removal, you are returned to the Vehicle details list screen.

### Results

The vehicle(s) you selected are gone from the list on the Vehicle details list screen, and the number of vehicles is adjusted to reflect the new total number.

### Next Steps

You can complete other crew management tasks, as necessary, or you can return to the main Work Manager options screen and continue with other tasks.

## 12.6 Adding Crew Time

### Context

There are a number of ways to access the Add Timesheet screens. The procedure below takes you through the most common way to add time for a crew member. The Crew Management component must be installed with SAP Work Manager to give you access to this option. When it is installed, you will see the Crew Management option on the main Work Manager screen.

### Procedure

1. From the main screen, tap *Crew Management*.

The Crew Management main screen displays.

2. There are several ways to access the Add Crew screen. You can select *Add Time* from the *Action* menu, or you can tap the *Add Time* button from the Crew Management main screen, or you can tap the *Add* button while you are viewing the Time Records detail screen.

The Add Timesheet screen displays.

3. From the drop-down menus, select the *Date*, Hours, *Abs/Att* (Attendance Type), and *Activity Type*. Then, select or enter a Work Order, enter a Network, and select the Work Center. Tap the green checkmark to finish the timesheet entry..

You are returned to the Crew Management screen and the number of Time Entries is adjusted to reflect the new total number of timesheets.

### Results

The time entries total is updated to reflect the new addition(s), and the new timesheet(s) you added are now listed on the Time Records detail screen.

### Next Steps

You can complete other crew management tasks, as necessary, or you can return to the main Work Manager options screen and continue with other tasks.

# 13 SAP Work Manager with Customer Service

## 13.1 SAP Work Manager with Customer Service

The Customer Service add-on component for SAP Work Manager is an optional component for use at sites where work on the application involves maintenance or services performed under contract for customers or other third parties.

When the Customer Service add-on component is implemented, it adds the following functionality to the core SAP Work Manager application:

- Basic customer information, including contact and address information
- Details of service engagements of the technician with the customer
- Details of business partners for the customer
- Depending on the configuration, you can add other business partners to both work orders and notifications, such as vendor, sold-to party, or person responsible
- You can edit the value of an existing business partner for both work orders and notifications

### i Note

You cannot change the business partner's type or details.

- Provides technicians access to contract and warranty information for the customer
- Related work order information
- Install base information on core components consisting of infrastructure information relevant to the work order
- Mapping functionality for both customer address and partner address, provided that the mobile devices has internet access

The following additional detail screens are available with the Customer Service add-on component:

- Address detail screen
- IBase detail screen
- Partners detail screen
- Contract detail screen
- Warranty detail screen
- History detail screen
- Pending detail screen

# 14 Working with Vehicle Stock

## 14.1 Vehicle Stock

The Vehicle Stock component is used by operators who keep stock items in vehicles meant for daily work. Vehicle Stock is also used for tracking tools and other items kept in the vehicles.

### i Note

Vehicle Stock is an optional component and may not be installed on your client. Check for the *Stock*, *Transfers*, or *STOs* icons or tabs on the main screen of the SAP Work Manager application. If you do not see these tabs or icons, then you do not have the Vehicle Stock component installed. Therefore, the information in this section is not applicable to your work site.

### Use

The Vehicle Stock component for SAP Work Manager provides inventory functionality for tracking stock items stored in vehicles, such as work trucks or vans.

### Vehicle Stock Overview

This component provides the following functionality:

- **Stock Transport Orders (STOs):** STOs can be created to request that inventory items be delivered to their vehicle storage locations from another plant.
- **Inventory Receipts:** Stock delivered as a result of an STO line item can be received into the vehicle storage locations. After it is received, the SAP back-end system updates quantities and creates material documents.
- **Transfers:** Items can be transferred from one vehicle to another, or from the vehicle to a static storage location.
- **Used/Actuals:** Accurate counts of vehicle stock are kept, with totals updated based on transfers and receipts.

## 14.2 Vehicle Stock Main Screen

Each record in the list represents one stock item. Each record is composed of several tabs displaying information about the stock, including stock, transfers, and STOs.

**Header pane:** The header pane of the left panel shows how many stock items are in the current viewable list after defining the search.

**Stock List:** The list of stock currently saved on the client. Each record in the list represents one material or stock item.

**Actions menu:** Allows you to perform standard actions, such as discarding a stock from the client or refreshing the stock list.

**Navigation tabs or icons:** Each icon at the bottom of the screen or tab at the top of the screen, depending on your mobile device, displays a different main screen. Tap the icons to access the screens. See the topics in this guide for more details on the screens.

## 14.3 Searching Vehicle Stock Inventory

To populate the Vehicle Stock list, perform a search to generate a list of stock items.

### Procedure

1. From the main Stock screen, tap the *Action* menu and select *Search*.  
The Stock Search screen displays.
2. Tap and select a *Material Group* and *Material Number*. At least one of these fields is required to generate a vehicle stock list.
3. Optionally, select a *Serial* number and a *Quantity* amount. When complete, tap *Finish* to bring down the stock to the main Stock screen.

### Results

The stock you chose from the Stock Search screen now populates the Vehicle Stock list, allowing you to work with that stock for your assignments.

## 14.4 Selecting Vehicle Stock using Check and Uncheck

You can check and uncheck single vehicle stock items on the vehicle stock list, or the entire vehicle stock list.

### Check or Uncheck Selected Vehicle Stock

Highlight an item from the stock list, tap the *Actions* menu icon, and tap *Check Selected*.

The selected item now displays a check mark in the box to the left of the item description. If desired, you can select one or more other unchecked items to toggle to checked. Then, you can perform actions on all checked items at one time, such as Discard Stock.

Select *UnCheck Selected* to clear the last-checked box.

### Check All and Uncheck All Vehicle Stock

Use the *Check All* or *UnCheck All* options from the *Actions* menu icon to either check all or uncheck all.

## 14.5 Working with Vehicle Stock Transfers

At times you may need to transfer stock from your vehicle to another vehicle or another storage location. To transfer stock, use the *Transfers* tab or icon on the main SAP Work Manager screen.

### i Note

To transfer stock from a different vehicle or storage location to your vehicle, use the *External* screen action menu to initiate a transfer. See the External Stock Overview topic for more details.

After you create a transfer header and populate items in the list, perform a transmit. The transmit sends the information to the SAP ERP backend. When the transmit is complete, the transfer list is cleared. Also, the items included in each transfer header are no longer be available in your Vehicle Stock list.

### Viewing Transfers

To view individual item details scheduled for transfer, tap on a transfer header from the list to display the Item details screen.

From the *Actions* menu, you can perform an *Edit Transfer* or you can *Add* another stock transfer.

To clear an item from the transfer header, tap the header item you want to clear. Then tap *Discard Item* from the *Actions* menu on its details screen. The item is removed from the transfer header and is returned to the available Vehicle Stock pool.

## 14.5.1 Transferring Vehicle Stock to Another Location

Transferring vehicle stock from your vehicle or location to another vehicle or location requires two steps: Creating a transfer header, and adding items to the transfer.

### Procedure

1. From the main Stock screen, select and highlight a stock that you wish to transfer.

The Stock detail screen displays.

2. Tap the *Action* menu icon and select *Transfer From Me*.

The Transfer Stock screen displays.

3. Tap in the *From* and *To* boxes to specify the locations to transfer the items using the on-screen keyboard. When done, tap *Done* to complete the transfer header creation.
4. Optionally, tap in the *Header Text* field and type a reason for the transfer using the on-screen keyboard.
5. Tap *Finish* to complete the transfer header.

The transfer header is displayed under the *Transfers* tab or icon, depending on your mobile device.

6. Tap the *Action* menu icon and select *Add Items* to add items to the newly created transfer header.

The Stock screen displays.

7. Check any stock items in the Stock list that you wish to add to the transfer header. Then tap the *Action* menu icon and select either *Transfer Selected* or *Transfer All*.

The Transfer Item screen displays. The screen displays for each item you have selected.

8. Type in the quantity of stock items you are transferring using the on-screen keyboard and tap *Finish* when complete.

The Transfers main screen appears, with the new transfer items you added on the list.

### Next Steps

When finished with the transfer, perform a transmit to transfer the stock item from your vehicle stock to the person you selected.

## 14.6 Working with Vehicle Stock Transport Orders (STOs)

A technician who needs an item not currently in stock in their vehicle can use the stock transport order actions to request and receive stock from other plants.

Stock Transport Orders, or STOs, are used by technicians who work out of their vehicles.

### Viewing STOs

To view STOs, tap on the *STOs* tab or icon, depending on your mobile client. Tap the *Action* menu icon and choose *Search* to perform a search for any STOs. After selecting your fields, click *Finish* to start the search.

### Viewing Receipts

Tap the *View Receipts* options from the *Action* menu icon to access the Receipts detail screen.

### Discarding an STO

To discard any STOs, select the STO, tap the *Action* menu icon and select either *Discard STO* or *Discard All* from the menu list.

### 14.6.1 Searching for STOs

Perform the STO search from the main STOs tab or screen, depending on your client device.

### Context

When you perform an initial transmit with the Vehicle Stock component installed with the SAP Work Manager application, the STO list is initially empty. Perform an STO search to populate the list. After the list is populated, you can *Discard STO* or *Discard All* using the *Action* icon menu, and reperform the search, if necessary.

## Procedure

1. Tap the main *STOs* tab or screen, depending on your client device.  
The main STOs screen displays.
2. From the main STOs screen, tap the *Action* menu icon and select *Search*.  
The STO Search screen displays.
3. Fill out any fields necessary to return the stocks desired for the desired populated STO list. When done, tap *Finish*.

## Results

The Stock Transport Orders list is populated with the stocks you selected from the search values.

## Next Steps

After retrieving a list of STOs, you can then view receipts, discard an STO, or discard all STOs from the *Action* icon menu list.

# 15 Working with External Stock

## 15.1 External Stock Overview

External Stock displays items that are in other locations but can have actions performed on them by the technician through the client.

### i Note

Vehicle Stock is an optional component and may not be installed on your client. If you do not see [Stock](#), [STOs](#), or [External Stock](#) icons or tabs on your client, you do not have the Vehicle Stock component.

Using [External Stock](#) action item allows you to search for an inventory of items that are available in other vehicles and locations. Conversely, searching for [Vehicle Stock](#) searches the inventory on your own truck.

## 15.2 External Stock Screen

Each record in the list represents one external stock item.

**Header pane:** The header pane of the left panel shows how many external stock items are in the current viewable list after defining the search.

**External Stock products list:** The list of external stock currently saved on the client. Each record in the list represents one external stock item.

**Actions icon menu:** Allows you to perform standard actions, such as searching for an external stock item or discarding the entire list.

## 15.3 Searching for External Vehicle Stock Items

To populate the External Stock list, perform a search to generate the necessary stock items.

### Procedure

1. From the External Stock screen, tap the [Action](#) menu icon and select [Search](#).  
The Stock Search screen displays.

2. Tap the *External Stock* radio button.
3. Select a product range by tapping in the *Material Range From* and *Material Range To* fields and filling in your selections.
4. Optionally, tap and select a *Plant*, *Partner*, and *Storage Location*.
5. Optionally, select a *Quantity* amount. When complete, tap *Finish* to bring down the stock to the External Stock screen.

## Results

The stock you chose to search for from the Stock Search screen now populates the External Stock list. You can now work with that external vehicle stock for your assignments.

## 15.4 Checking and Unchecking External Vehicle Stock

Use the *Action* icon menu to check and uncheck the entire item list with a single action.

To perform certain actions on multiple list items, work with the *Check All* and *UnCheck All* functions in the *Action* menu.

### i Note

You can double-tap on a stock row to toggle the row, instead of using the *Actions* menu steps.

### Checking All External Stock

Highlight an item from the stock list, tap the *Actions* menu icon, and tap *Check All*. A checkmark appears in the box next to all items.

You can now perform actions on all checked items, such as discarding them or transferring them to yourself.

### Unchecking All External Stock

If all external stock items have checkmarks, tap the *Actions* menu icon and tap *UnCheck All* from the list. All items on the list are now unchecked.

## 15.5 Working with External Stock Transfers

At times, you may need to transfer stock to your vehicle from another vehicle or another storage location. To do transfer stock, use the *Transfer* action on the External Stock screen.

### i Note

To transfer stock from your vehicle to a different vehicle or storage location, use the *Action* menu icon on the Vehicle Stock screen to initiate a transfer.

After you create a transfer header and populate the items in the transfer header, perform a transmit to send the information to the SAP ERP backend. When the transmit complete, the Transfer list is empty and the items included in each transfer header are no longer available in your vehicle stock list.

### Viewing Transfers

Select the *Transfers* tab or icon, depending on your mobile device, to see all pending transfer headers on your client. The *Action* menu icon gives you the option to add items to the transfer header.

### Transferring External Stock To Your Vehicle

Transferring vehicle stock to your vehicle or location from another vehicle or location requires two steps: create a transfer header and add items to the transfer. To create the transfer header, select the *Transfer To Me* option from the *Actions* icon menu while you have the External Stock screen open. The Transfer Stock screen displays. Select the *To*, or destination information, from the available list (the destination location must match your location or user information) and then tap *Finish*. The Transfer Item screen displays next.

When finished, tap back to the *Transfers* tab or screen to view your new transfer.

### Adding Items to a Transfer

To add items to a transfer header, highlight the transfer header, and from the *Actions* menu icon, tap *Add Items*. The Stock screen displays, showing the items that are already part of the transfer.

To add more items, tap either *Transfer Selected* or *Transfer All* from the *Actions* menu. The Stock search screen displays.

Select the *Plant* and *Partner*, and enter a *Quantity*. If an item is serialized, enter the appropriate *Serial* numbers from the pop-up list. Click *Finish* when you are done with the Stock search screen. The newest item is added to the Transfer Stocks detail screen.

After all items are added to a transfer header, perform a transmit. The transmit completes the transfer from your vehicle or location to the new vehicle or location.

## 15.6 Working with Stock Transport Orders (STOs)

A technician who needs an item not currently in stock in their vehicle can use the stock transport order actions to request and receive stock from other plant locations.

Stock Transport Orders (STOs) are used by technicians who work out of their vehicles.

### Viewing STOs

To view STOs, tap the *STOs* tab or icon, depending on your mobile device.

### Searching STOs

To search stock transport orders, tap *Search* from the *Actions* menu icon.

Make the desired selections to identify the search and tap *Finish*. The STO list is populated with a new list of STOs.

### Viewing Receipts

Tap an STO from the current list to open the detail screen. Then tap the *View Receipts* option from the *Actions* menu to access the Receipts detail screen.

### Clearing an STO

To clear an STO, tap on the STO you want to clear. Tap *Clear* from the *Actions* menu. You are asked to confirm that you want to delete the selected STO. Tap *Yes* to clear it from the list.

## 15.6.1 Searching for STOs

Perform the STO search from the *STOs* tab or icon, depending on your mobile client.

### Context

When you perform an initial transmit with the Vehicle Stock component installed, the STO list is empty. Perform an initial STO search to populate the list. Once the list is populated, you can *Discard STO* or *Discard All STOs* using the *Action* icon menu. Then you can reperform the search, if necessary.

### Procedure

1. From the *STOs* tab or icon, tap the *Actions* menu icon and select *Search*.  
The STO Search screen displays.
2. Fill out any fields necessary to return the stocks desired for the STO list you wish populated. When done, tap *Finish*.

### Results

The STO list is populated with the stocks you selected from the search values.

### Next Steps

After retrieving a list of STOs, you can then receive items, receive all items, discard STO, or discard all STOs using the *Actions* icon menu.

## 15.6.2 Adding an STO

### Prerequisites

- You must have *External Stock* selected on the *Stock* tab or icon, depending on your mobile device.
- You must already have external stock in your list on the *Stock* tab or icon. See the topic *Searching for External Vehicle Stock Items* **for more details**.

## Context

Adding an STO creates a local stock transport order on your mobile device. The local STO generates is a purchase order when transmitted to the back end. The purchase order is your request for the materials listed on the STO.

## Procedure

1. Click the *Stock* tab or icon, depending on the type of mobile device you are using.
2. From the *Action* menu icon, select *External Stock* if it is not already selected.
3. Click the *STOs* tab or icon, depending on the type of mobile device you are using.
4. Click *Add STO* from the *Action* menu icon.

The Transport Order Header screen displays.

5. Fill out desired fields. Complete the *Plant* field. The other fields may be optional depending on your site. Tap *Finish* when complete.

The Stock screen displays.

6. Select the stock to populate your STO from the available list. Click the *Action* menu icon and choose *Add Selected*, *Add All*, or *Cancel*.

An STO Item screen appears for each item you choose on the previous screen.

7. Fill out the desired fields for each item. Click *Finish* when done.

A new STO Item screen appears for each item you selected on the Stock screen. After you complete all STO Item screens, you are returned to the STOs screen.

## Results

A new Local STO is created with your selections made on the STO. You can edit the STO or discard the STO. You can also edit or discard any of the items on the STO.

## Next Steps



Perform a transmit. After your STO is approved on the back end and is returned to your client, you can perform a search for it and for other existing STOs. See the topic *Searching for STOs* **for more details**.

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