HEXAGON PPM

Intergraph Smart® Completions User Guide

Field Technician

Version 2
March 2018

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Preface

The user guide is intended for a “Field Technician” who would be responsible for task execution in the field.

A Field Technician should have the following know-how:

- Access the iOS App Store and download applications.
- Configure the Smart Completions Mobile App.
- Use the mobile app to view data, execute tasks, punchlist and sync.
- Access SC site to verify that mobile app data was uploaded correctly.

The user guide will cover the following topics and will enable the end user to import all project information, perform specific project database configurations, and create and administer work packages to the project workforce.

The training material INCLUDES:

- Download the SC CCMS Mobile Application from the iOS App Store
- Configure Application Settings (Server Selection)
- SC Mobile Application Login
- Sync Mobile Application with SC database
- Common Navigation Features (Navigation Ribbon)
- Seeking (Quick Search) Feature
- Task Checkout
- Sync Tasks to the Mobile Device
- Offline Task Execution
- Sync Completed Task

SECTION 1

Smart Completions Mobile Application

1.1 - Mobile Application Overview

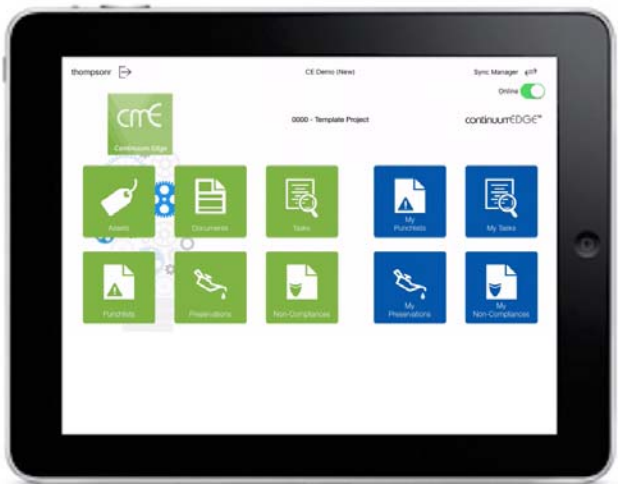
The SC Mobile Application is designed to simplify daily tasks and planning for field personnel.

When used in conjunction with SC's Completions & Commissioning System (CCMS), the SC Mobile Application can be used to simplify punch listing, collection of equipment information, and execution of paperless tasks from the field - with or without Wi-Fi connections readily available all from your mobile device.

The mobile application provides field personnel; access to content located in a database located on your company intranet or through a Hosted internet solution.

The mobile application is used to:

- Retrieve and Edit (e.g. Primary & OEM Data) detailed equipment (asset) information.
- Retrieve detailed document information and view the document itself (e.g. P&IDs, Datasheets).
- View and Execute tasks (e.g. FICs - Field Installation Checks) electronically.
- Enter and complete Punchlist items in the field (with as-found & as-left images).
- View and Execute Preservation tasks electronically.
- Enter and complete Non-Compliance items in the field (w/ as-found / as-left images).



1.2 – Mobile Application Configuration (Apple IOS)

In order to use the SC Mobile Application it must be downloaded from the iOS App Store and then configured.

The process for downloading and configuring the SC Mobile Application is outlined below:

Download the SC CCMS Mobile Application from the iOS App Store.

Configure Application Settings (Server Selection)

Select the Application from your iPad 'Home' screen to open

Setup your SC site on the mobile application by selecting the **Notepad** icon on the Login page. The Server Selection window will open.

Server Selection:

1. Enter Server Name – 'default' is displayed but the name can be changed.
2. Enter API URL – e.g. http://demo.ibs-cloud.com/

Note:

In order to configure the SC Mobile Application you must know the URL of your SC site.

Your SC site may be 'http' or 'https' this will need to be entered correctly. If you are unsure, please contact your SC Administrator.

3. Select **Add Server** button.

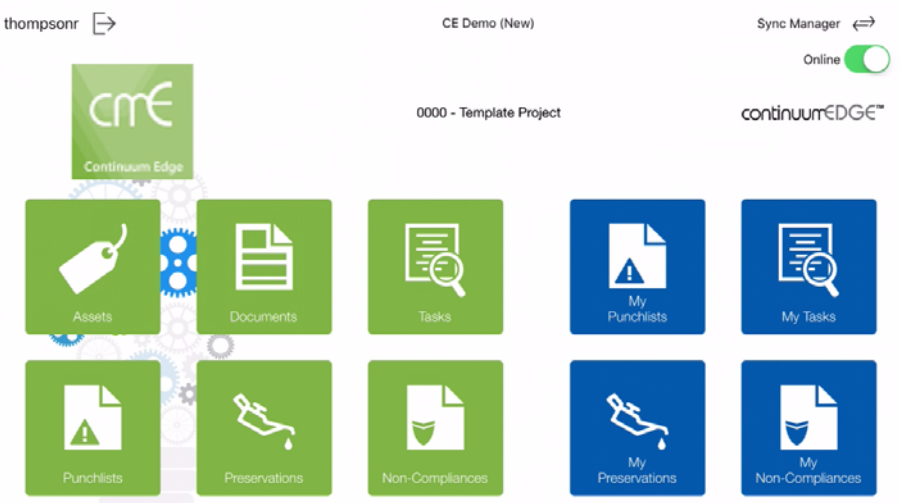
1.3 – Mobile Application Login

The site dropdown list will be populated with your SC site(s).

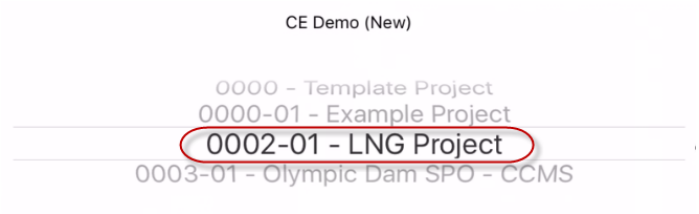
Note:

If you have multiple sites (e.g. production & test), expand the dropdown to show all available sites. Select the site you wish to login to.

Enter Username and Password.
Select **Login** button.



The SC Mobile Application Homepage is loaded.



Select project from the Project Selection spinner (if applicable).

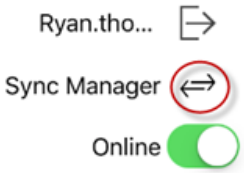
Note:

If the user is assigned to more than one project they will need to ensure to select the project they want before syncing the mobile device.

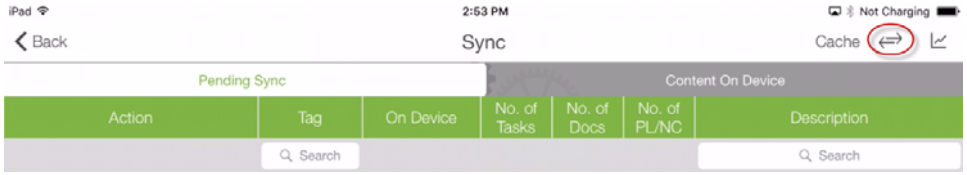
1.4 – Sync Mobile Application with SC Database

Once the Project has been selected the User needs to sync the Mobile device to pull down all relevant data from the SC database (e.g. http://demo.ibs-cloud.com/).

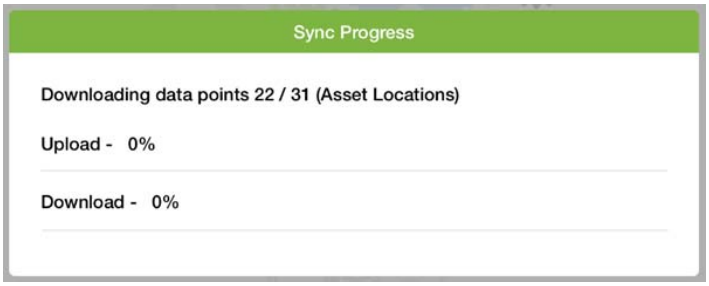
The process for Syncing the SC Mobile Application to the SC database is outlined below:



Select the **Sync Manager** icon from the Homepage.



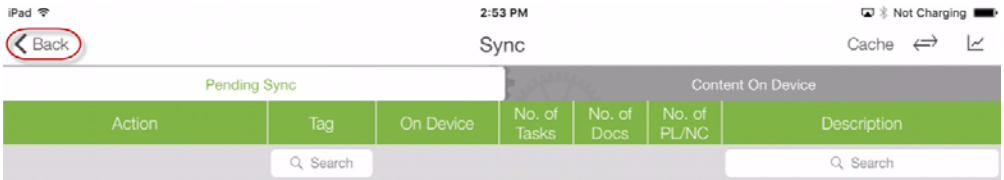
Select the **Sync** icon from the Sync Manager.



The Mobile Application will sync with your SC database.

Note:

Once the sync is complete the 'Sync Progress' window will close



Select the **Back** button to return to the Homepage.

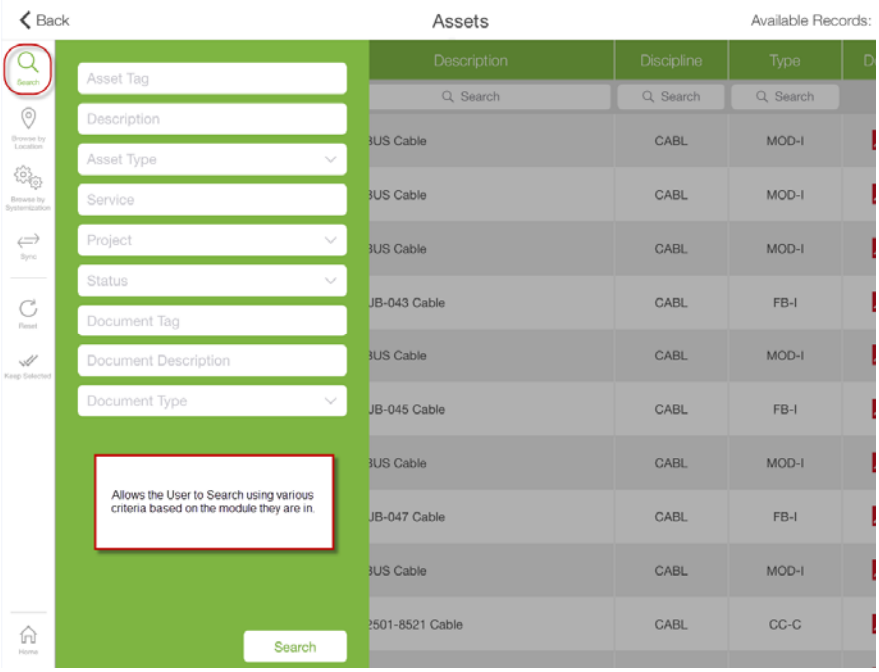
SECTION 2

Smart Completions Mobile Application Use

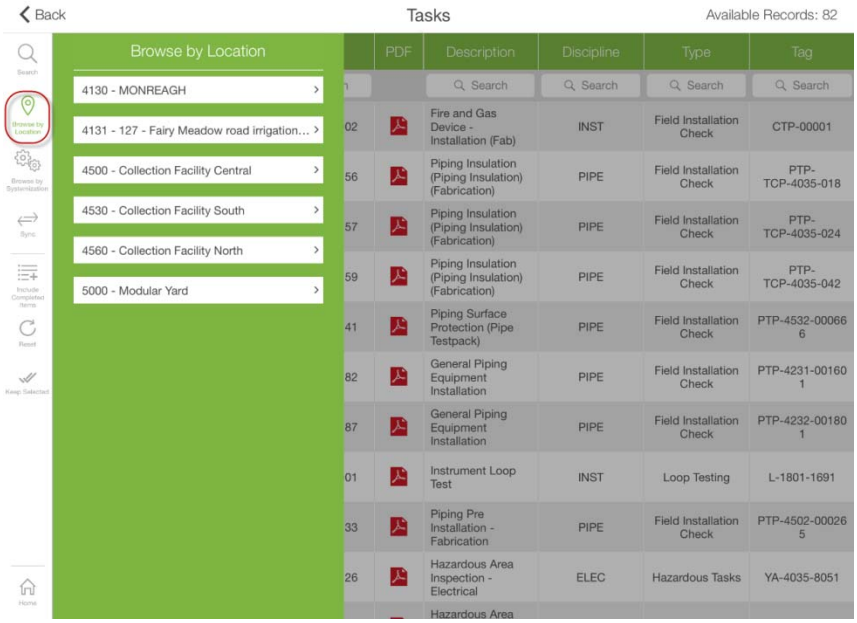
2.1 – Mobile Application Navigation Ribbon

Now that the Mobile Application has been synced with the SC database the User can now navigate the application to locate CCMS data (Assets, Document, Tasks, etc.) The Mobile Application has a set of common features that can be used to find data. This is done by using the Navigation Ribbon.

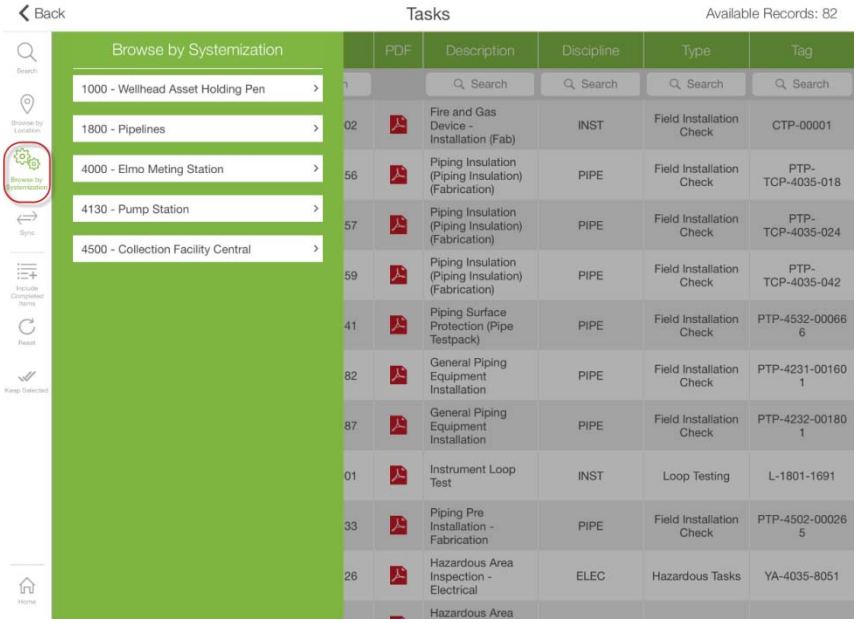
The common features of the Navigation Ribbon are explained below:



Search

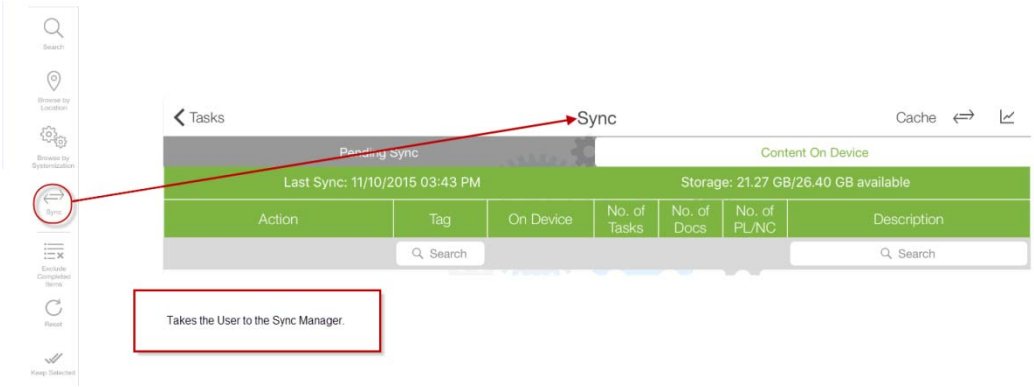


Browse by Location

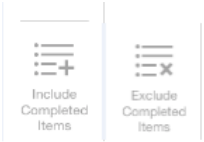


Browse by Systemization

Browse by WBS (Work Breakdown Structure)

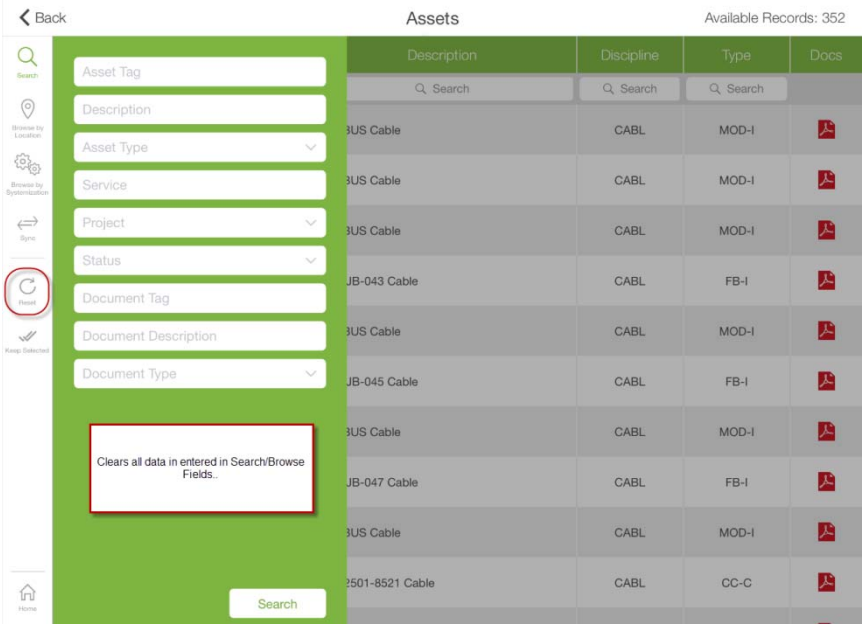


Sync

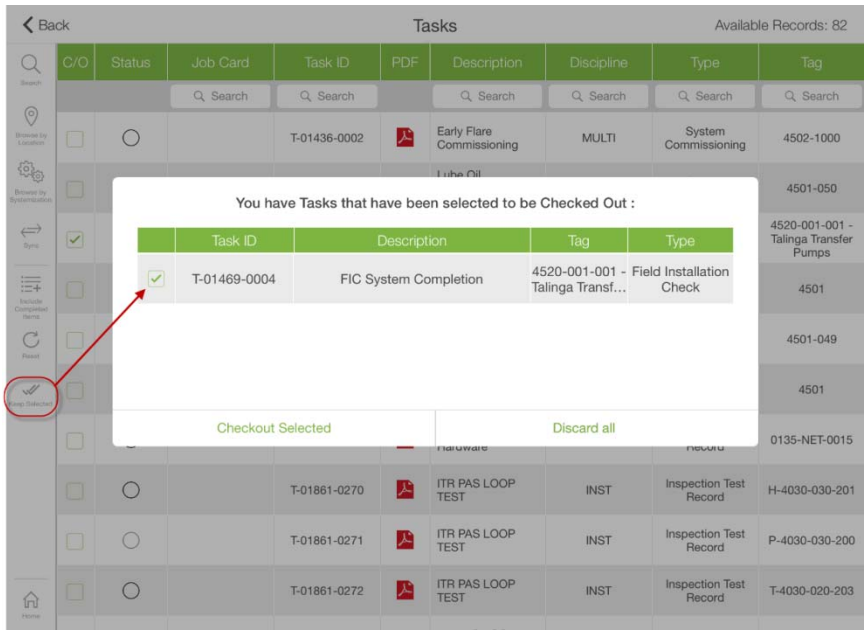


Allows User to expand/reduce results based on Completion Status.

Include/Exclude Completed Items



Reset



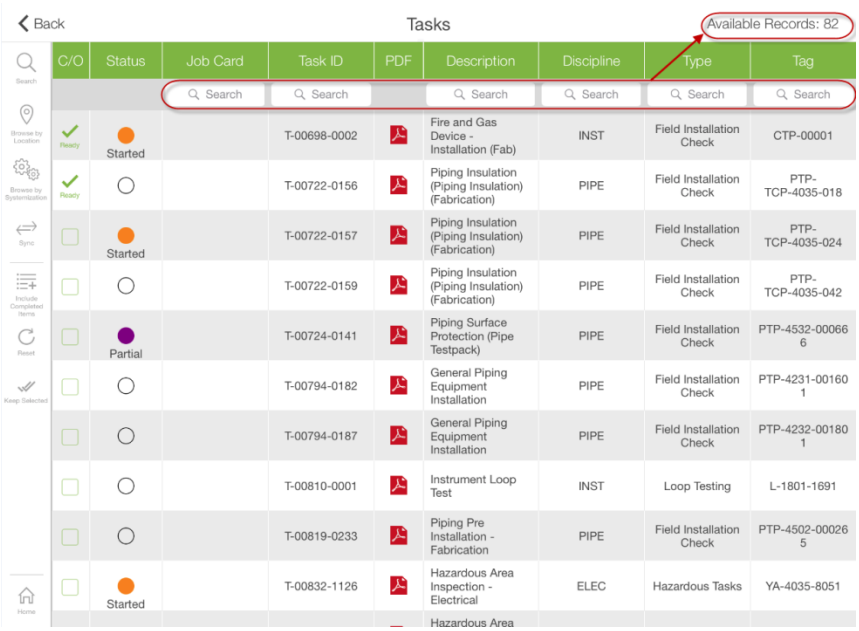
Keep Selected

Home

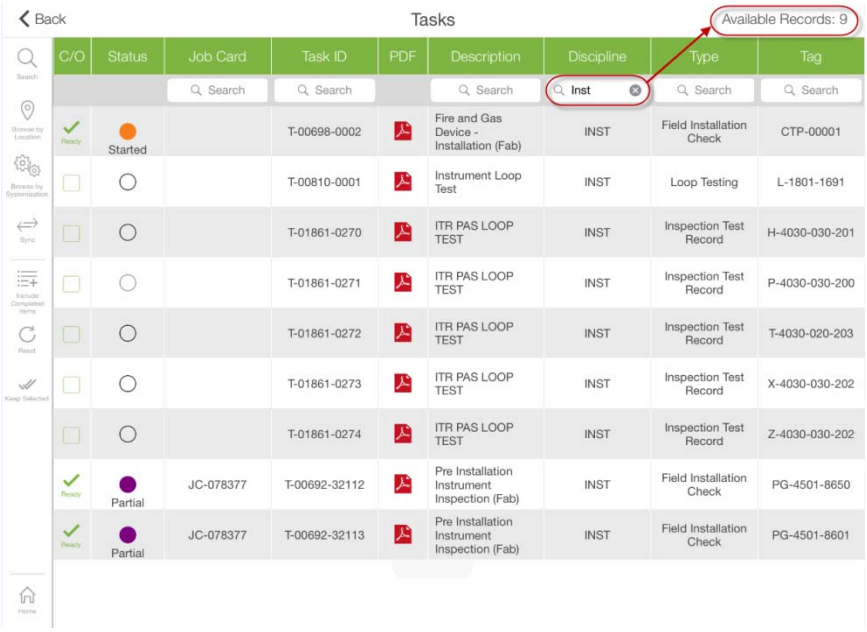
2.2 Mobile Application Navigation - Search

The Seeking feature allows a User to filter data based on data inputted in the 'Search Box' in a manager.

The functionality of the Seeking feature is outlined below:



No data inputted.



Data inputted (filtered by Discipline).

SECTION 3

Checkout Task and Sync to Mobile

3.1 Task Checkout

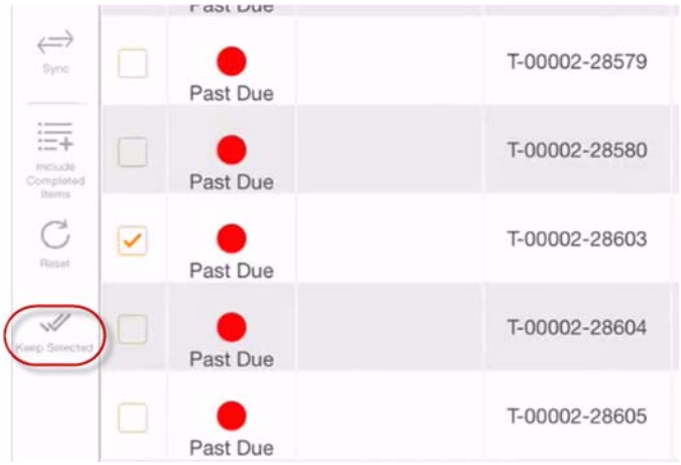
Now that the User understand how to navigate the Mobile Application they can search for and checkout Tasks.

From the Homepage select the **Tasks** icon.

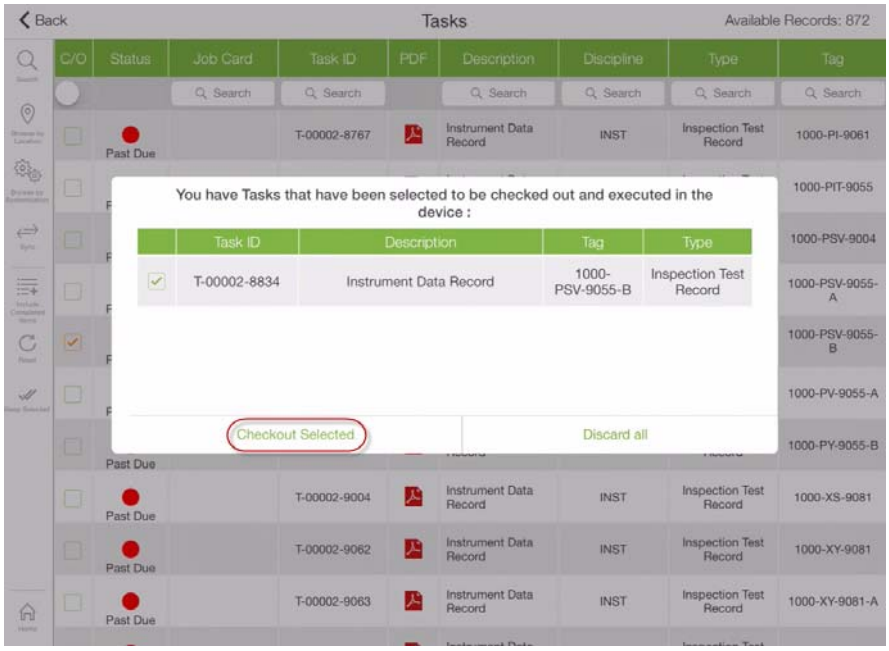
Locate the Tasks you want to check out (using the 'Navigation Ribbon' or 'Seeking' functionality). Select the Tasks by clicking on the Green checkbox in the C/O column.

Note:

Once you have selected the Tasks; the checkbox will turn Orange and a checkmark will appear and are now flagged for checkout.



To check out the Tasks, select the **Keep Selected** button from the Navigation Ribbon.



A notification window will appear informing the User that they have a Tasks selected to be checked out. To check out the listed Tasks click the **Checkout Selected** button.

The notification window will close and the Orange checkbox and checkmark will now be Green with “Ready” displayed underneath.

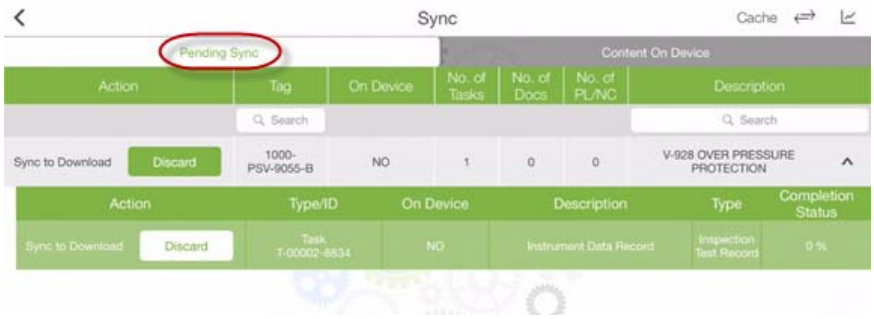
The selected Tasks are now ready to be synced down to the mobile device for offline execution.

3.2 – Sync Tasks to your Mobile Device

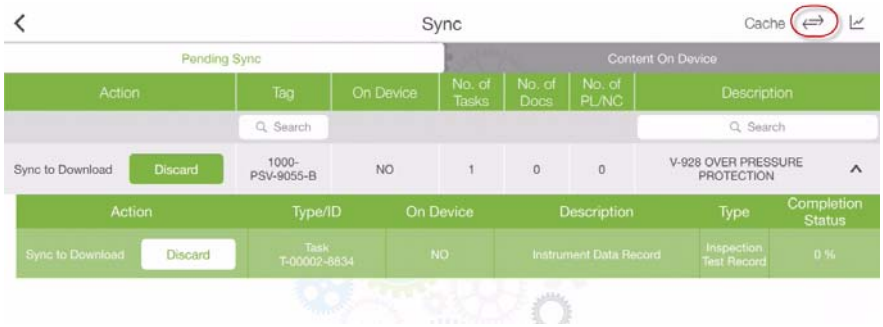
Now that Tasks have been selected and are “Ready” they can be synced to the Mobile Device.

The process for syncing Tasks to the Mobile Device is outlined below:

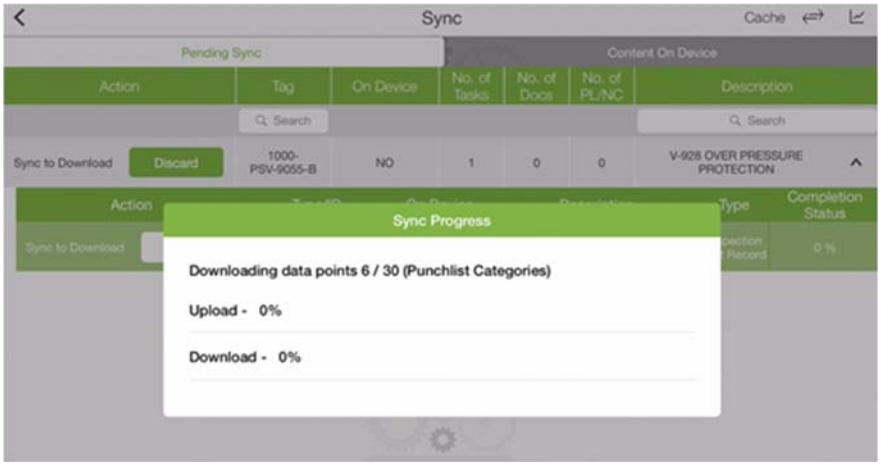
To Sync Tasks down to the Mobile Device select the **Sync** button from the Navigation Ribbon.



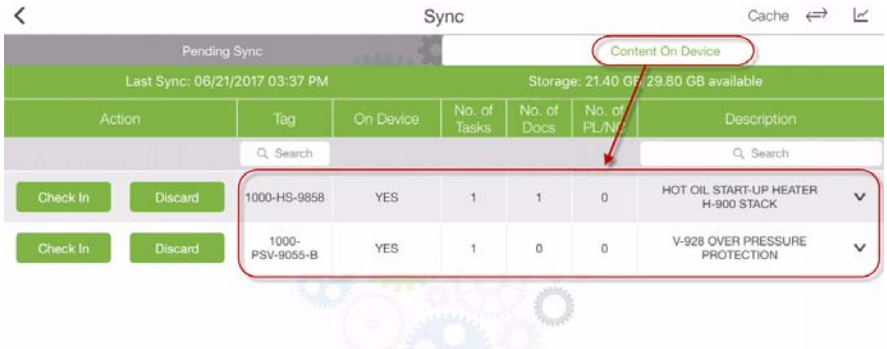
In the Sync Manager’s ‘Pending Sync’ tab you will see a collection of Tasks (along with any reference data e.g. Assets & Documents).



Select the **Sync** icon to sync the Tasks and related data onto the Mobile Device.



A Sync Progress window will open and inform the User of the sync status.



The Tasks and related data are now synced down onto the Mobile Device.

The user can verify by selecting the 'Content on Device' tab.

The Task(s) can now be completed while offline.

SECTION 4

Offline Execution & Syncing of Completed Tasks

4.1 – Offline Task Execution

Now that the Tasks have been synced to the Mobile Device they can be executed in the field while Offline (no internet connection).

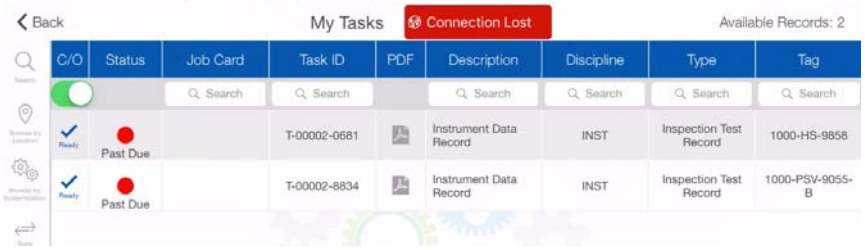
Note:

On the Homepage there is an Online/Offline toggle button. When executing Tasks out in the field the toggle needs to be set to Offline (button to the Left). This will ensure that the device doesn't switch between online and offline while completing tasks as this can prevent proper use and data could be lost.

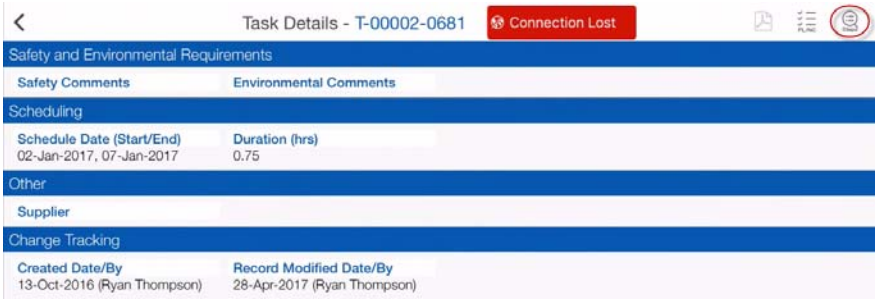
The process for executing a Task offline is outlined below:

When the Mobile Device is in Offline mode only the Assets, Documents and “My” Managers are available to access.

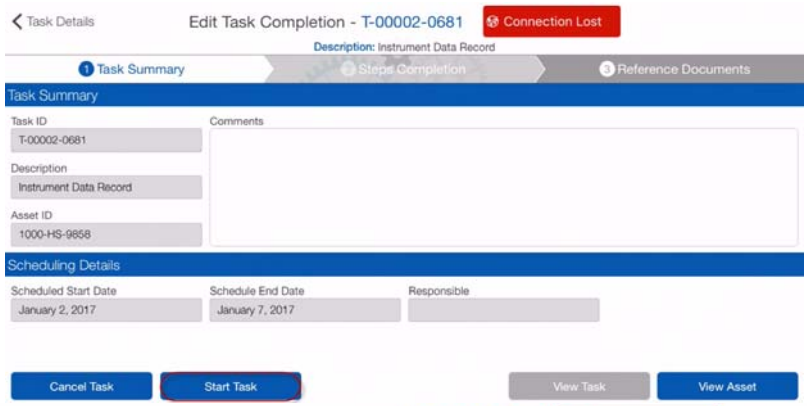
Select the **My Tasks** icon to open the manager to view and complete Tasks.



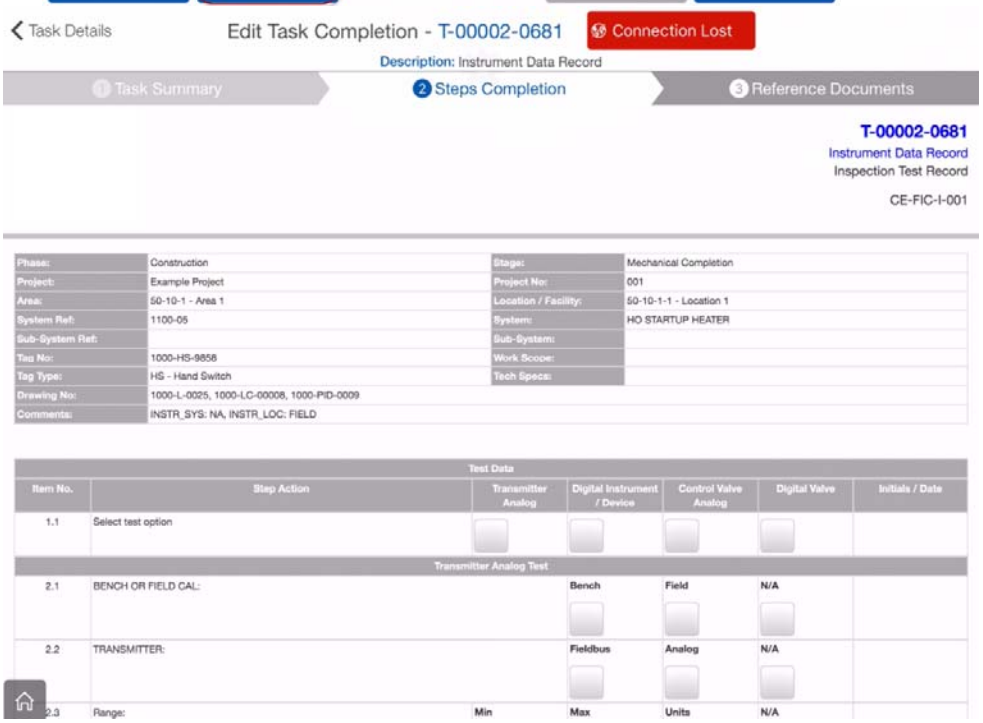
All Tasks that you have checked out from the Mobile Device or that have been checked out to the User from SC will be shown in the manager.



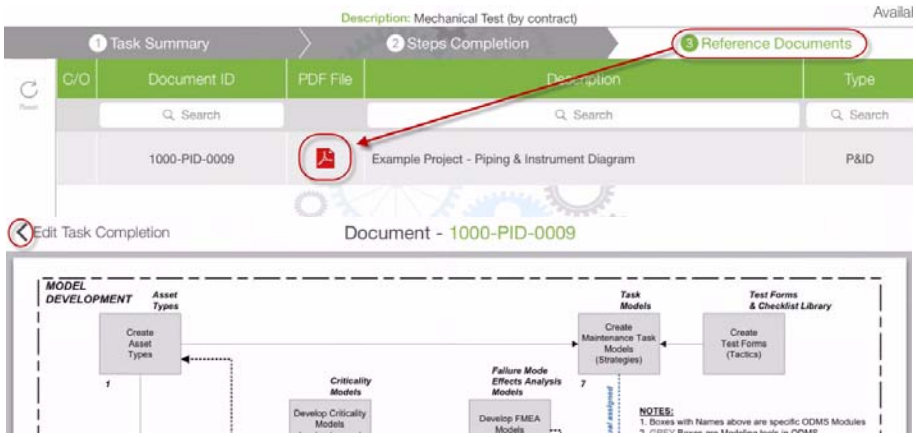
Select the Task to execute. The ‘Task Details’ window will open to show the User information about the task. To view the ‘Task Summary’ window and then start the Task select the **Steps** icon in the top right of the window.



Select the **Start Task** button to execute the Task.



The User now completes the Task by answering each step question.

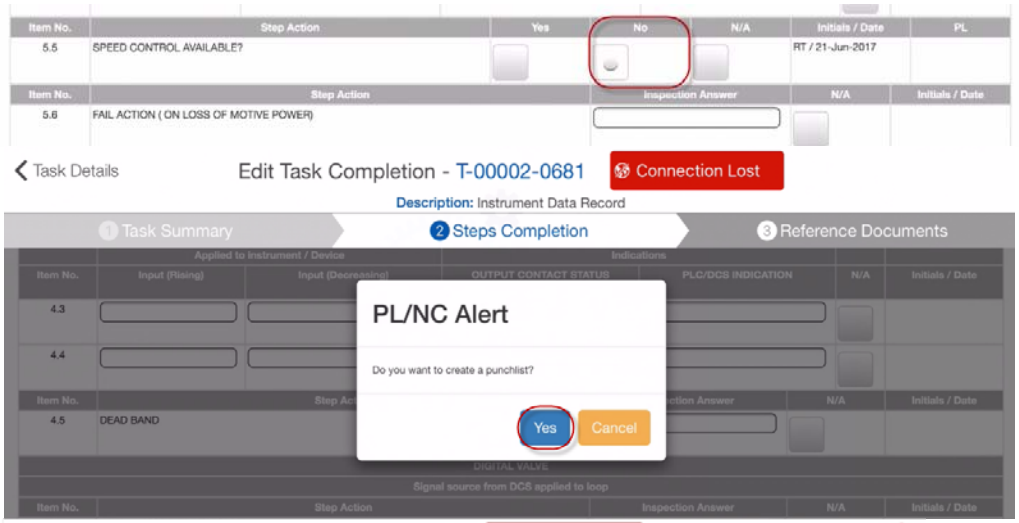


Note:

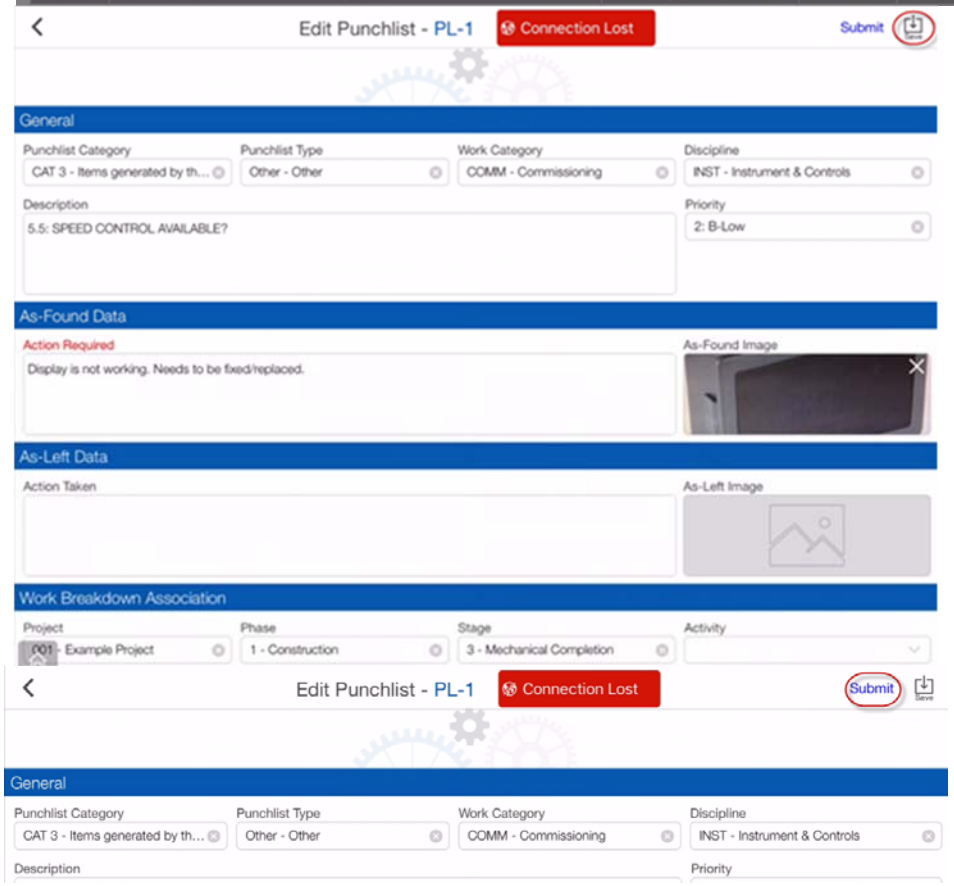
The User can also access Reference Documents associated with the Task by selecting the 'Reference Documents' tab and a list of available documents are listed.

Select the **PDF** icon for the document the User wants to view. The document will open. To close the document and

return to the Task select the **Back** icon and then the 'Steps Completion' tab.



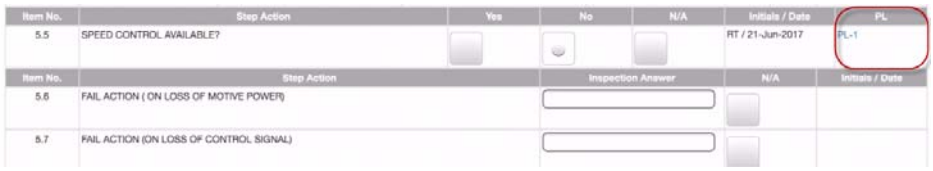
If when completing the Task the User enters a value that is out of range or a checkbox that is flagged to create a Punchlist (e.g. Reject, No) a PL/NC Alert window will open. The User selects the **Yes** button to create a Punchlist.

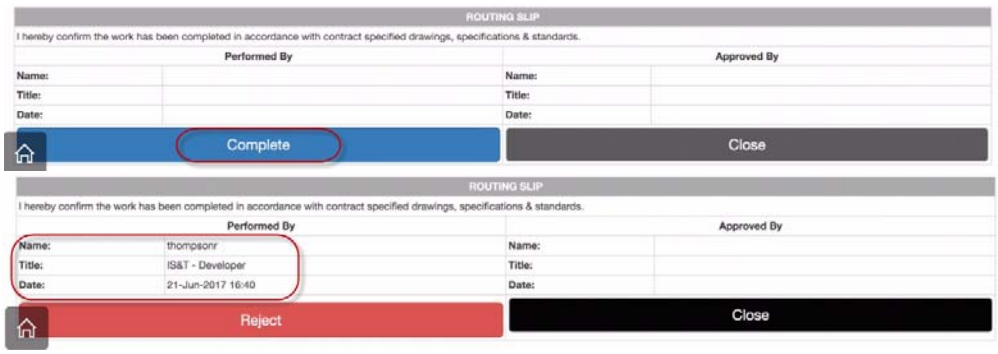


A Punchlist Edit Form will open and the User enters all applicable fields (including taking a photo of the PL item) and then saves the Punchlist record.

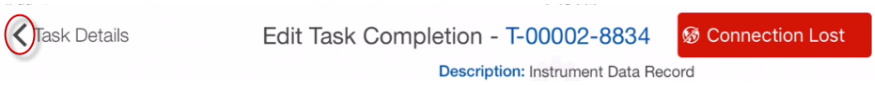
Note:

The Punchlist can also be assigned a workflow state if desired. This is done by selecting the state.





Once the Punchlist is saved the User will be returned to the Task and the Punchlist will be referenced in the step.
Once the Task has been completed the User will select the **Complete** button at the bottom of the form. This will fill in the 'Performed By' details of the Task.



To return to the Task list the User selects the back icon until they are returned to the 'My Tasks' manager.

4.2 – Sync Completed Tasks

When the user has finished all Tasks (this would include a partially completed Task) they can now sync the Tasks back to SC.

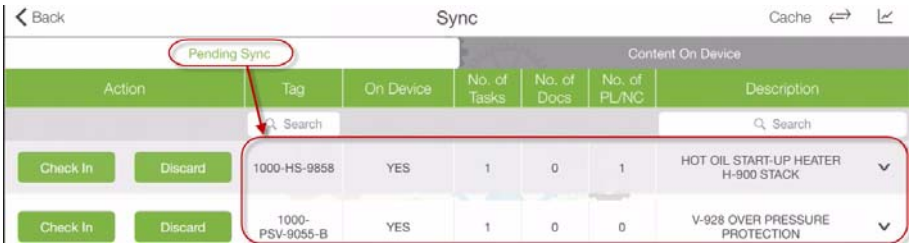
The process for syncing completed Tasks is outlined below:

To sync the completed Tasks and any associated data (e.g. Punchlists) the User selects the Home icon to return to the Homepage. The User then toggles the **Online/Offline** button to "Online".

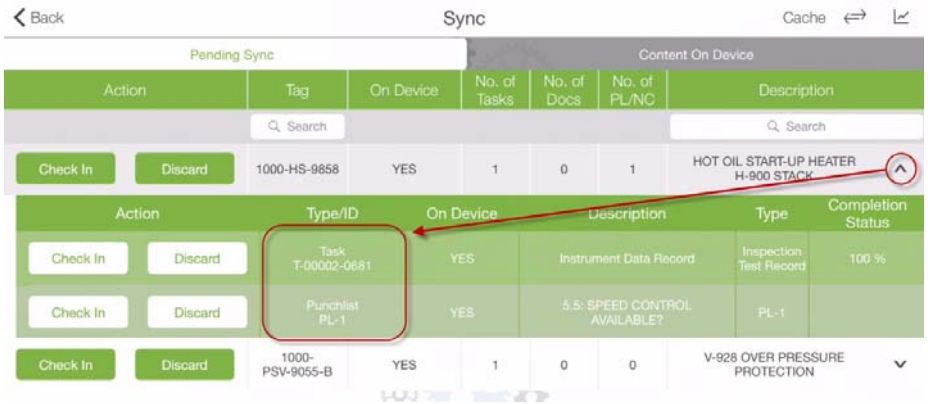
Note:

The User must be in a location where there is internet access.

The User will then access the Sync Manager by selecting the **Sync Manager** icon.



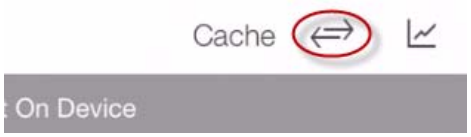
In the Sync Manager's 'Pending Sync' tab the User will see all data (Tasks, Punchlists, etc.) that requires syncing.



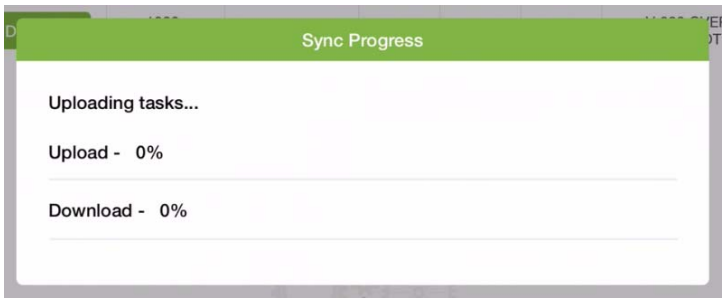
Note:

The list is displayed collapsed, listing by Asset Tag. To expand/collapse the list click on the arrow at the far right and all items (e.g. Tasks, Punchlists, etc.) related to that Asset tag are displayed/hidden.

To sync data back to SC the User selects the **Check In** button for all items to be synced. When this button has been selected it will display "Sync to Check In".



The User now selects the **Sync** icon to sync content to SC.



A Sync Progress window will display showing the User the progress of the sync. When syncing is complete the window will close.

The user can now verify in their SC site that the data has been synced.

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