TOOLWATCH® Mobile User Guide

Introduction

ToolWatch Field and Warehouse applications have been added to the Enterprise platform. Users can now operate ToolWatch on Android and iOS tablets and smart phones. These apps interact directly with the ToolWatch Enterprise system, allowing for seamless communication between all connected devices and platforms.

While the desktop (Enterprise) platform is used mainly by system administrators, accounting and executive personnel, the mobile apps are designed for field (e.g. project managers, superintendents, field workers, support staff) and warehouse teams (e.g. warehouse managers, warehouse support, and drivers). These applications will help keep jobsites organized, efficient, on schedule and on budget. The portability and flexibility provided by having a mobile interface will allow companies a more comprehensive and timely perspective of their operations.

Key advantages of the Mobile apps include the ability to create requisitions and pick tickets, process transfers and conduct inventory counts in real-time, showing the changes almost immediately to all connected devices throughout the system. This replaces the need for manual synchronization, saving time and eliminating potential errors while resulting in increased productivity and profitability for your company.

Installation and Login

Android Devices: Search for ToolWatch and download “ToolWatch Mobile” from Google Play
iOS Devices: Search for ToolWatch and download “ToolWatch Mobile” from the App Store

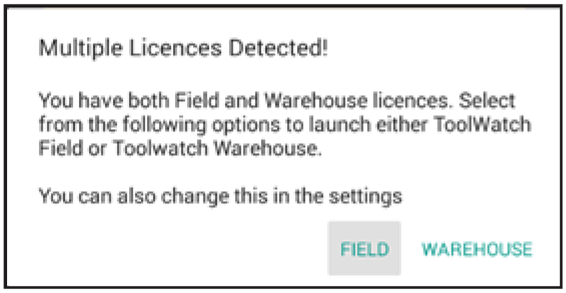
1. Open the ToolWatch Mobile App.
2. Enter your assigned credentials.

The mobile device being used must have internet connectivity at all times. A stronger and more reliable connection will result in better and faster operation of the app.

Note: ToolWatch Mobile respects user permissions, list visibility and assigned stock location set in ToolWatch Enterprise.

Licensing Requirements

In order to use ToolWatch Mobile the user must have a ToolWatch license and credentials issued by their ToolWatch administrator.



If prompted, choose to launch the Field or Warehouse App.

Access to the apps is dependent upon the users license.

Mobile App: Warehouse

Menu Screen

Once logged in, a Home Screen will direct the user to information pertaining to the Apps.

1. Tap the icon from any screen to open a Menu screen.
2. From this screen the user will be able to select

    HOME

    SEARCH

    TRANSFER TICKET

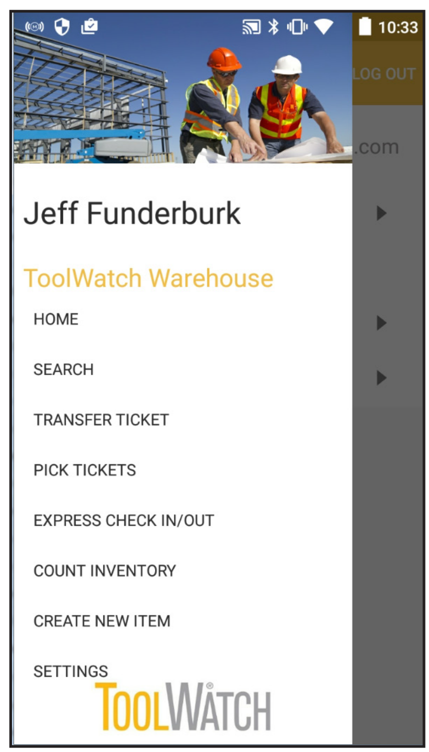
    PICK TICKET

    EXPRESS CHECK IN/OUT

    COUNT INVENTORY

    CREATE NEW ITEM

    SETTINGS

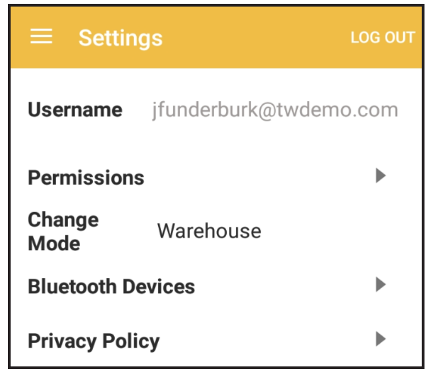


Settings

LOG OUT: Tap the button at the top right of the screen.

Username: Named user who is currently operating the app.

Permissions: View named user assigned permissions here. Tap the icon to display assigned permissions. Permissions are assigned by a designated Administrator in ToolWatch Enterprise.



Change Mode: Allows the named user to toggle between the *Field* and *Warehouse Apps.*

Bluetooth Device: Allows user to connect to an RFID scanner.

Privacy Policy: Takes user to a link that explains ToolWatch's privacy policy

Enterprise Permission Setting	Warehouse App Functionality
Pick Tickets & Transfers -> Transfers -> Execute	Enables the Transfers and Check In/Out menu options Allows Items to be added to a Transfer Ticket Unlocks the Express Check In/Out menu option Enables transferring of picked items
Tools & Equipment -> Tool Detail -> Edit	Enables the user to Change Status and Update Meter
Pick Tickets & Transfers -> Count Inventory -> View	Enables the Count Inventory menu options Enables the ability to Count items on existing tickets
Pick Tickets & Transfers -> Count Inventory -> Add	Enables the user to create a new Count ticket User must have the above "view" permission as well
Pick Tickets & Transfers -> Pick Ticket -> Edit	Enables the Pick Ticket Menu Option Enables the ability to view the status of open tickets Enables ability to edit open tickets
Pick Tickets & Transfers -> Pick Ticket -> Execute	Enables "Mark Ticket as Complete" option which closes the ticket User must have the above "Edit" permission as well

The table above describes the correlation between permissions in Enterprise and the Warehouse App functionality.

Search

Locate and identify tools and materials in the field.

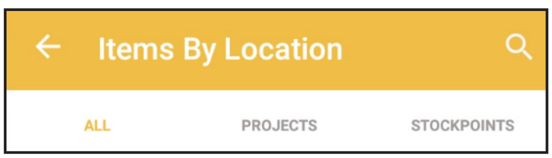
Tools By Employee: Generates a list of all employees visible to the named user.

Select employee from the list to view tools assigned to employee.

To Narrow the Search:

1. Tap the icon on Android devices. Tap the Search bar on iOS devices.
2. Type letters from the employees first or last name.
3. Tools from the selected employee will be displayed on a *Results* screen.
4. Select tool from the list.

Items by Location: Generates a list of all locations and tools assigned to each location.



Select location to display items assigned there.

To Narrow the Search:

1. Tap the icon on Android devices. Tap the Search bar on iOS devices to type all or part of a location.
2. Separate locations by *Projects* (job sites or non-stock locations) and *Stockpoints.*
3. Items (tools and materials) assigned to the selected location will be displayed on a *Results* screen.
4. Select item from the list.

Items by Category: Generates a list of all items separated into categories.

1. Tap the icon on Android devices. Tap the Search bar on iOS devices to type all or part of a category.
2. Select a category to display a generated list of items specific to the chosen category.
3. Items (tools or materials) will be displayed on a *Results* screen. (Materials are only displayed at Stock Locations.)
4. Select item from the list.

Performing a Manual Search:

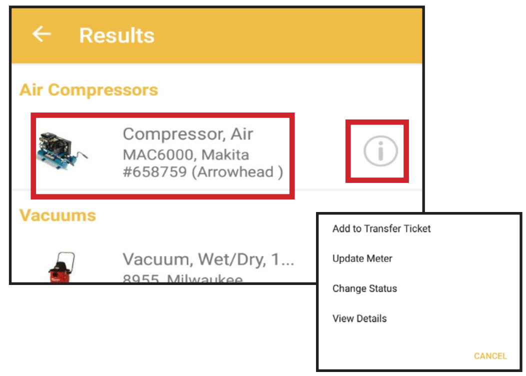
1. Tap the icon at the bottom right of the screen on Andriod devices, or the icon at the top right on iOS devices to search by item number, bar code, model, model description, employee, location, description or category.
    - If the user is equiped with a hand help scanner, a bar code can be scanned here.
2. Tap the icon at the top right of the screen on Android devices, or the icon at the top right of iOS devices to open a camera to enable user to capture a barcode.
3. Tap *CLOSE* to return to the *Search* screen.

From the *Results* screen:

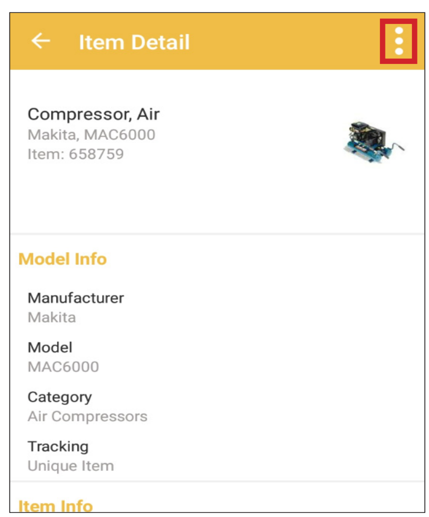
1. Tap on the chosen item (tool or material) to perform the following functions:

    Unique Tools:
    - Add to a TRANSFER Ticket: Selected item is added to a Transfer Ticket. If this is the first Unique item added, a Transfer ticket will be generated with the assigned location of the item as the FROM.
    - Update Meter: Meter reading can be entered here.
    - Change Status: Assigned status can be changed here. (Status options are entered in *Enterprise* by a desktop user.)
    - View Details: View model, item, stock and assignment information.

    Quantity or Material Items:
    - Add to a TransferTicket
    - View Details



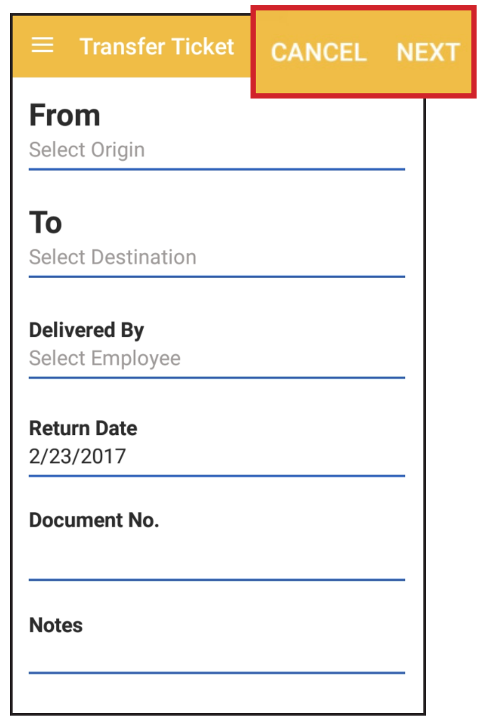
2. Tap the icon to open a shortcut to view *Item Detail.*
3. From the *Item Detail* screen, tap the icon to:
    - Add to a Transfer Ticket
    - Edit Item
    - View Model



Transfer Ticket

Document changes in tool and material assignments (locations, employees). A *Transfer* ticket may be generated through the TRANSFER TICKET and SEARCH tabs.

Creating a Transfer Ticket:

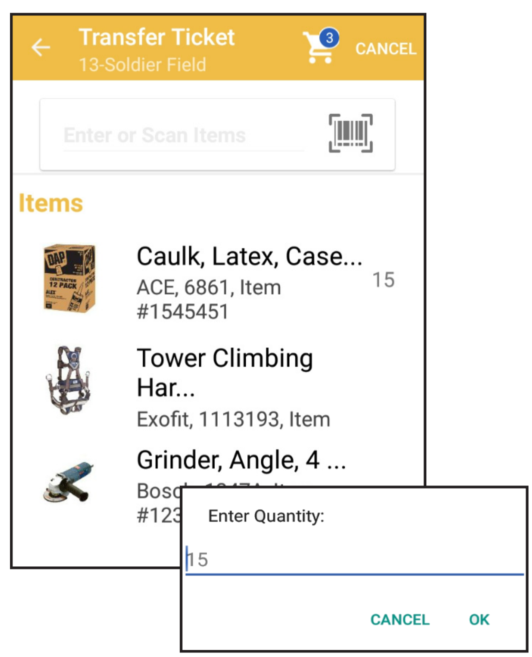


1. Tap the following fields to populate:
   - **From (Required field):** User will be prompted to enter an optional cost center and cost code.

*If a Unique item is added to a **Transfer Ticket** from the SEARCH tab, the From will automatically populate based on the assigned location of the Unique tool.*

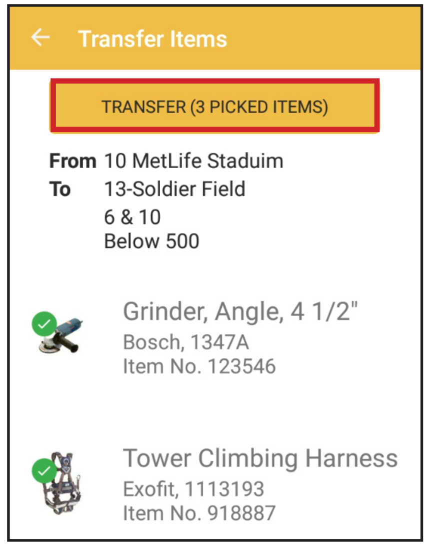
   - **To (Required Field):** User will be prompted to enter an optional cost center and cost code.
   - **Delivered By:** Select an employee who is assigned to deliver items.
   - **Return Date**
   - **Document Number**
   - **Notes**
2. Tap NEXT in the upper right corner to begin adding items or CANCEL to discard the ticket.

Adding Items to a Transfer Ticket by:



1. Tap "Enter or Scan Items":
   - Use a scanner to scan a barcode.
   - Manually enter a barcode, item number or serial number.
   - Tap the icon to open a camera to scan the barcode.
2. If multiple item records are populated, user can choose NONE, ALL or select individual tools on the Multiple Items Found. Selected items will display a checkmark.
3. Tap DONE to add items to the ticket.
4. Repeat steps 1-3 to add additional items or add items from the *Search* tab.
5. If prompted, enter a quantity.
6. Tap on an item to:
   - View Details
   - Change Quantity (Quantity tools and materials)
   - Remove Item

Submitting a Transfer Ticket:



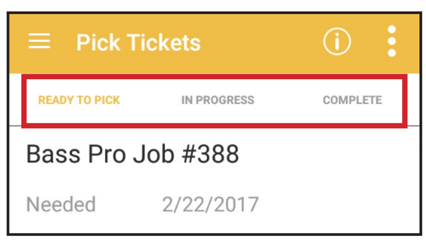
1. Tap the  icon at the top of the screen.
2. A *Transfer Items* screen will display:
   - Items selected to be transfered
   - To and From assignment
   - Cost Codes and Cost Center (If applicable)
3. Additional items can be added by going back to the previous screen.
4. Tap transfer to continue.
5. A Select Signee screen opens.
6. User can select an employee from the populated list or use the search feature to select employee or tap SKIP at the top right to continue without designating a signee.
7. A signature box is displayed to enter an optional signature. A signature is captured as an image and added to the archived Transfer Ticket.

Note: Completed Transfers are visible in *Enterprise* and are distinguished by “WH” for Warehouse Apps followed by a ticket number. (WH1234)

Pick Ticket

View and pick items requested for jobsites or employees.

Sorting/Viewing Pick Tickets:

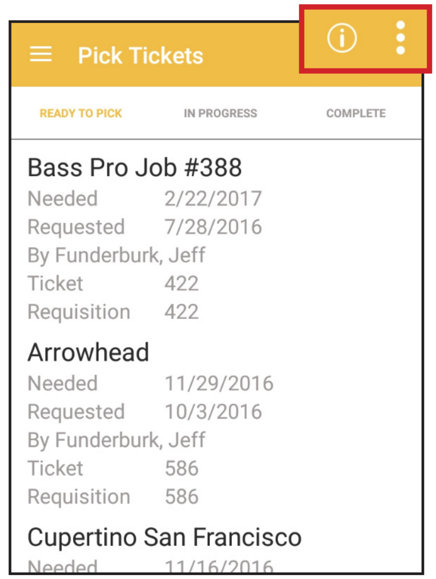


A User can sort and view Pick Tickets in the following statuses:

- <u>READY TO PICK</u>: Ticket has been approved for process in *Enterprise*.
- <u>IN PROGRESS:</u> Ticket has been partially picked.
- <u>COMPLETE:</u>Ticket has been marked as complete or transfered and marked as complete.

Tap the icon at the top right of the screen to view the following detailed information about each pick ticket:

- Requested location or employee
- Date Needed
- Date Requested
- Ticket Number
- Requisition Number

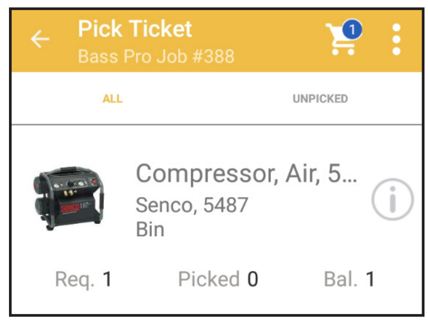


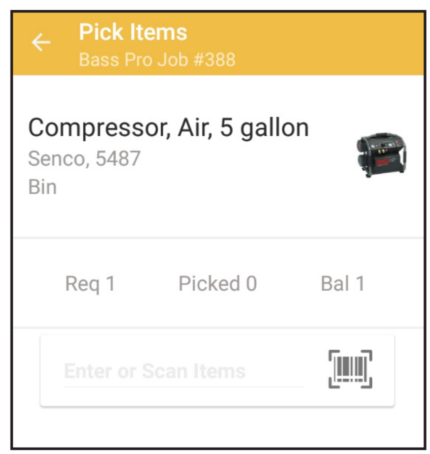
Tap the icon to sort Pick Tickets by:

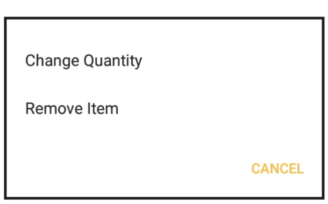
- Date Needed
- Date Requested
- Requested For
- Requested By

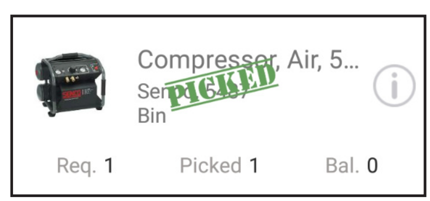
Picking a Pick Ticket

1. Tap the ticket to open and view the following:
    - Model Records for each requested item
    - Number of Requested (Req) items per model
    - Number of Picked items per model
    - Remaining Balance (Bal) per model
2. Tap the item to be picked.
3. Tap “Enter or Scan Items”:
    - Use a scanner to scan a barcode.
    - Manually enter a barcode, item number or serial number.
4. Tap the icon to open a camera to scan the barcode.
5. If search populates multiple item records, user can choose NONE, ALL or select individual tools on the Multiple Items Found. Selected items will display a checkmark.
6. Tap Done to add items to the ticket.
7. For quantity items or materials, enter a quantity.
9. Tap on an item to:
    - <u>Change Quantity</u> (Quantity tools and materials only)
    - <u>Remove Item</u>





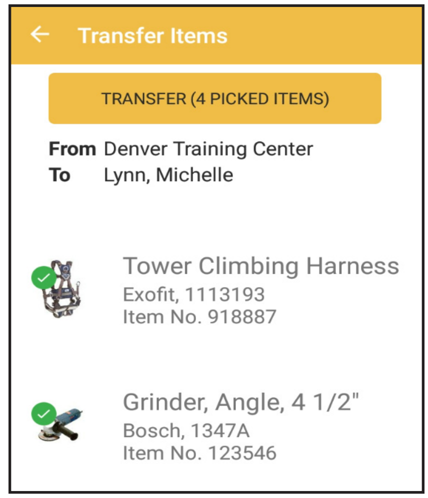


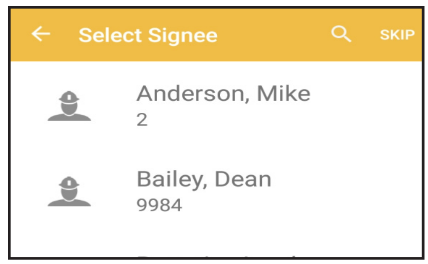


Once all Requested items have been picked, a green PICKED image will appear on the model record.

Transferring Items and Completing a Pick Ticket:

1. Tap the icon at the top of the screen.
2. Tap transfer to submit transfer items.
3. A Select Signee screen opens.
4. User can select an employee from the populated list, use the search feature to select employee, or skip the signature.
5. A signature box is displayed to enter an optional signature. A signature is captured as an image and added to an archived Transfer Ticket.
6. Tap DONE to Complete Transfer.
7. To Complete and Close the Pick Ticket:
   Tap the icon and Mark Ticket As Completed. A completed Ticket can no longer be edited.



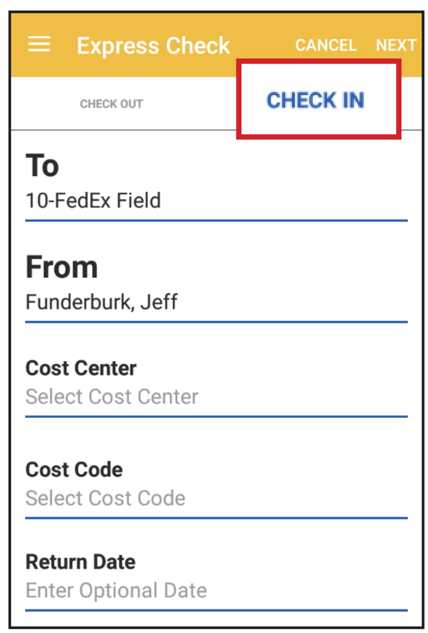


Express Check In/Out

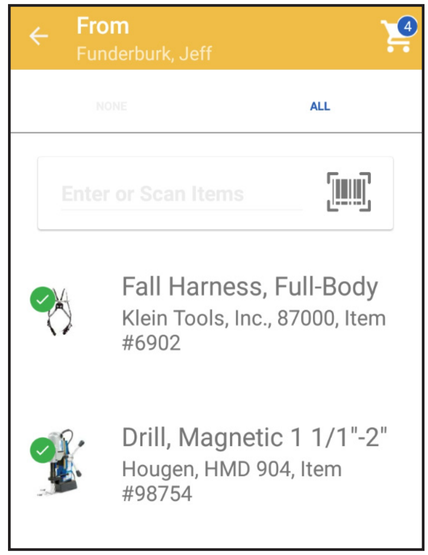
Populate and quickly transfer items from an employee to a designated location (Check In), or quickly populate items from a designated location to an employee (Check Out).
Note: The order of the From and To fields change depending upon Check in or check out.

Creating and Submitting an Express Check In Ticket:

1. From the Express Check screen, tap CHECK IN.
2. Populate the following:
   - **To:** (Required)Populated with the stock location where the user is currently pinned (Field can be edited.) Once edited, the selected location remains populated by default.
   - **From**: (Required) Select employee
   - **Cost Center**: (Optional) Tied to employee
   - **Cost Code**: (Optional) Tied to employee
   - **Return Date**: (Optional)
3. Tap NEXT at the top right to continue. Tap CANCEL to discard ticket.
4. A list of items currently assigned to the chosen employee will be generated. Items can be added at this point.

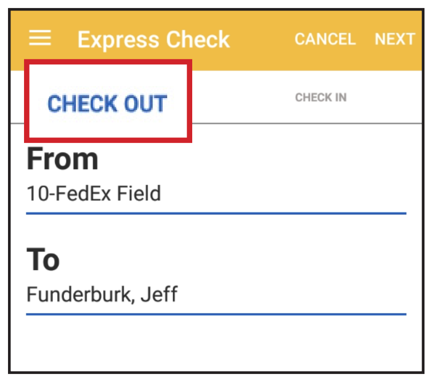


5. Items to be Checked in will be indicated by a green check mark. User can choose to select ALL (Default setting) to automatically check all items or NONE to manually select tools that are to be checked in.
6. Additional items can be added to the ticket by entering or scanning a barcode.
    - Unique Tools: items will automatically be added to the ticket.
    - Quantity Items: Enter the quantity of the items being checked in.
7. Tap the  icon to transfer and reassign checked items.
8. Follow the steps for submitting a transfer.



Creating and Submitting an Express Check Out Ticket:

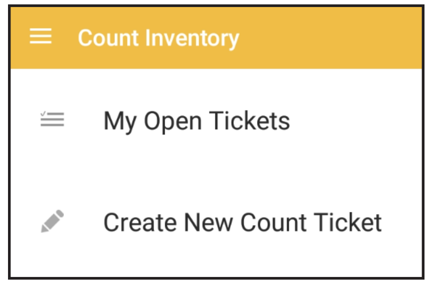
1. From the Express Check screen, tap CHECK OUT.
2. Populate the following:
    - **From**: (Required) Populated with the stock location where the user is assigned.
    - **To:** Select employee (Required)
    - **Cost Center**: (Optional) Tied to Employee
    - **Cost Code**: (Optional) Tied to Employee
    - **Return Date**: (Optional)
3. Tap NEXT at the top right to continue. Tap CANCEL to discard ticket.
4. Follow steps 6-8 above for selecting and transferring items

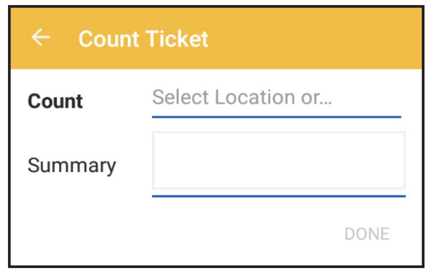


Count Inventory

Conduct an inventory count with an unpopulated count ticket or conduct an inventory count based on a pre-populated ticket (created in *Enterprise*).

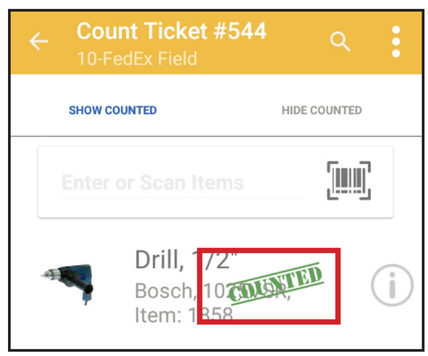
Creating a Unpopulated Count Ticket:





1. Tap Create New Count Ticket.
2. Tap Count to select a location or employee.
3. Separate locations by Projects, Stock Locations or Employees
4. Tap summary to enter a summary of the ticket contents.
5. Tap DONE to open the ticket and begin counting items.

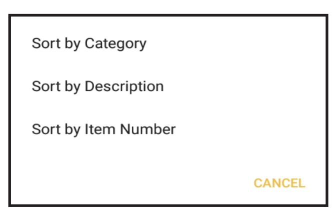
Counting Items on a Unpopulated Count TIcket:



1. Tap “Enter or Scan Items”:
    - Use a scanner to scan a barcode.
    - Manually enter a barcode, item number or serial number.
2. Tap the icon to open a camera to scan the barcode.
3. A Unique tool is automatically added to the ticket.
4. Enter a quantity for a quantity tool or material.
5. If search populates multiple item records, user can choose NONE, ALL or select individual tools on the Multiple Items Found screen. Selected items will display a checkmark. A quantity can be entered for quantity tools or materials.
6. Tap Done to add items to the ticket.
7. A green COUNTED image will appear over the item once counted.

Once a ticket is open a user may:

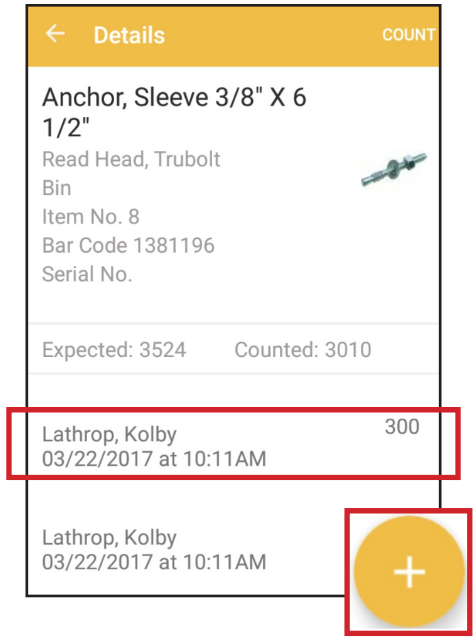
- Tap the icon to sort items
- Filter items by:
    - Show Counted (All)
    - Hide Counted
    - Search ticket for specific items



Editing counted items:

Unique Tools:
1. Tap on the green COUNTED image to remove item from count ticket.
2. Tap the icon to:
   - View details
   - “UNCOUNT” (tap “UNCOUNT” at the top right)
3. From the details screen, tap on record to add a note.

Quantity Tools/ Materials
1. Tap on the item to create an additonal count record.
2. Tap the icon to:
   - View details
3. Tap the icon to add additional counted items.
4. Each time a count is entered, a separate record is created.
5. Add an optional note to the new record.
6. Tap an individual record to:
   - Change Quantity
   - Add a Note
   - Delete Item
7. Once all expected items are counted, a green COUNTED image will appear.
8. If the number of counted items does not match the expected number, but the count is complete tap COUNT on Android or icon on iOS devices at the top right corner to mark as counted.
9. Tap “UNCOUNT” at the top right of the *Details* screen on Andriod devices or the icon to remove the green Counted image.



Counting a pre-populated ticket:

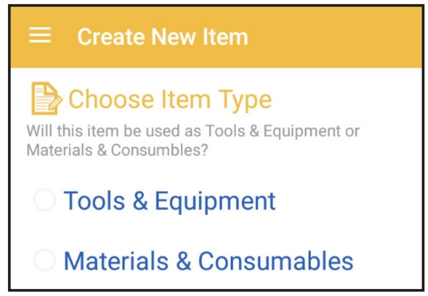
1. From the Count Inventory Screen, tap on “My Open Tickets”.
2. Choose from list of open Count tickets (included in this list are all count tickets that have been opened).
3. Tap on an item to count.
4. Follow steps above for marking items for editing.

Create New Item

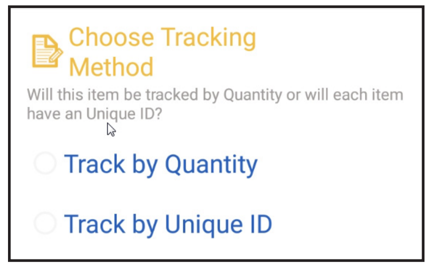
Create new Model Record and add Tool Records to inventory.

Create a New Item : Entering Model Information Part 1:

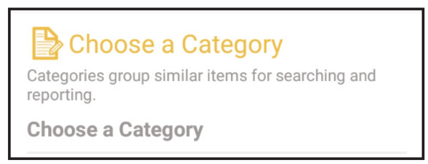
Steps 1-5 below will help determine if there is an existing model record for the new item.



1. **Choose Item Type**.
    - Tool & Equipment
    - Materials and Consumables

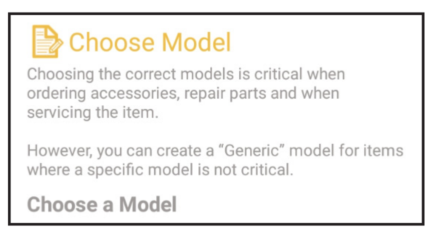


2. **Choose Tracking Method**.
    - Track by Quantity
    - Track by Unique ID



3. Tap **Choose a Category** to either:
    - Select existing category from populated list. Only categories for the selected item type from step 1 are shown. (Tap the icon to search categories)
    - Create a New Category

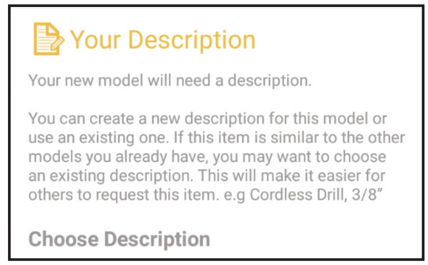
4. Tap **Choose Manufacturer** to either:
    - Select an existing manufacturer from populated list. (Tap the icon to search manufacturers)
    - Create a New Manufacturer.



5. Tap **Choose Model** to either:
    - Select an existing model from populated list. Only Models for selected item type and manufacturer are shown. (Tap the icon to search models)
    - Create a New Model.

If a matching model record is found, the model detail screen will open and allow for the creation of additional items. If there is not an existing Model record, one can be created by completing step 6.

6. Tap **Your Description** to either:
- Select an existing description from populated list. (Tap the icon to search descriptions)
- Create a New Description.

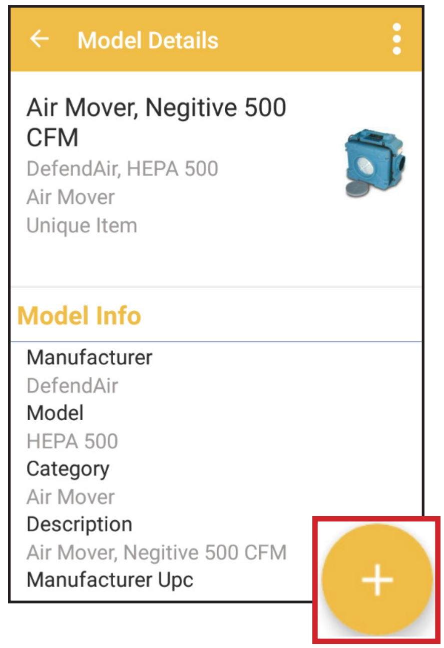


Create a New Item: Add items to a Model Record Part 2

Once a Model has been found or created, items or stock can be added:

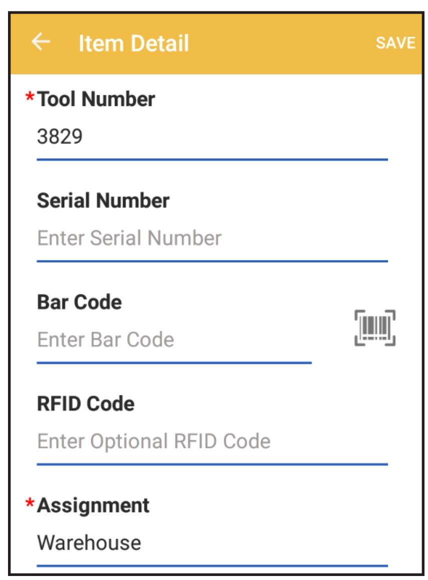
From the *Model Details* Screen:

1. Tap the icon a on Andriod devices, or the icon on iOS devices to:
   - <u>Add Items to Your Inventory Using This Model:</u> (Unique Tools) This opens an *Item Detail* screen to allow user to add a new tool record.
   - <u>Start Inventory Tracking For This Item</u>: (Quantity Items and Materials) This Opens an Item Details screen to add an Assignment and Quantity.
   - As a shortcut on Andriod devices: tap the icon to add items or start tracking inventory.



2. Enter the following Item Detail information:
   Unique Items:
   - **Tool Number***(Required Field)
   - **Serial Number**
   - **Bar Code** (Option to scan a barcode)
   - **RFID Code**
   - **Assignment*** (Required Field)

   Quantity Items/Materials:
   - **Stock Location***(Required Field)
   - **Quantity**
3. Tap SAVE to create the new tool record and begin tracking the item(s). To add additional items, repeat steps 2 and 3.



The *Model Detail* screen is accessable through the manual search feature by selecting an item from the model grouping. Scroll down to see Model grouping section.

Create a New Item from an existing Model (From Search)

1. Use the serch feature to locate an item.
2. From the *Item Details* screen tap the icon on Andriod devices, or the icon on iOS devices and choose view model.
3. Follow the steps from part 2 above to add items or stock to inventory.

Editing existing Model Records

From the *Model Detail* Screen:

1. Tap the icon a on Andriod devices, or the icon on iOS devices
2. Select Edit Model Details.
3. Edits may be made to the following:

   - **Model image** by tapping on the camera icon and capturing an image
   - **Edit the manufacturer**
   - **Model**
   - **Catergory**
   - **Description**
   - **Manufacturer UPC**

Editing Unique Tool Records

From the *Item Detail* Sccreen:

1. Tap the icon on Andriod devices, or the icon on iOS devices
2. Select Edit Item
3. Edits may be made to the following:
   - **Model image** by tapping on the camera icon and capturing an image
   - **Barcode**
   - **RFID**
   - **Serial Number**
   - **Status**
   - **Meter Level**