Project NextGen
Igniting change, uniting teams.

Touchstone Mobile Application
Navigation & Overview

Role: All Roles

TSMob-WI-0010-Navigation & Overview

Purpose:
This Work Instruction defines the steps to navigate the Touchstone Mobile Application.

Primary Use:
This Work Instruction is used for the following scenarios:

1. Logging in
2. Syncing
3. Landing Page / Start Page
4. Search, Sorting & Filters
5. Features

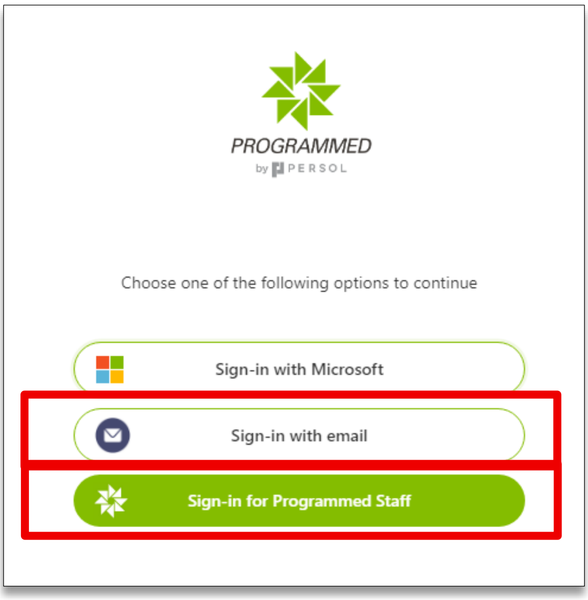
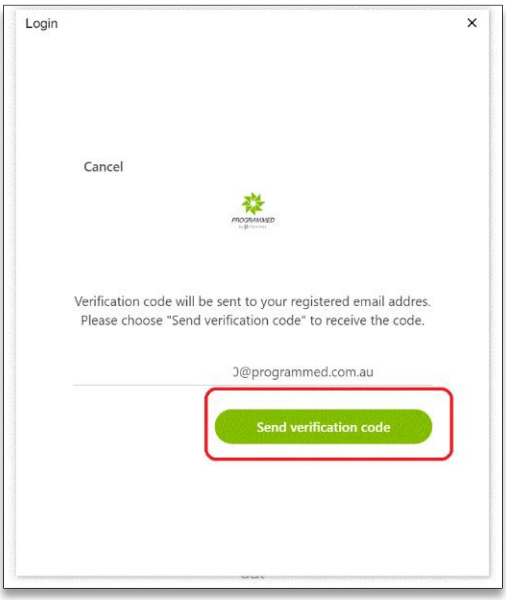
Business Unit Application:
This Work Instruction applies to Programmed Facilities Management.

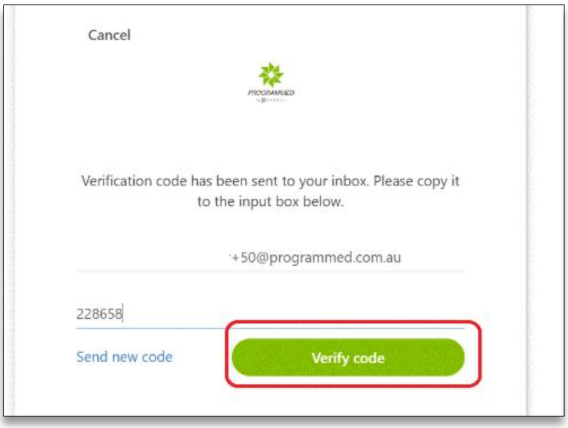
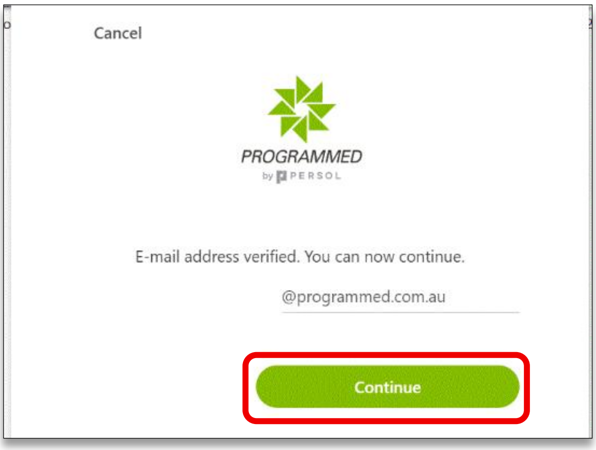
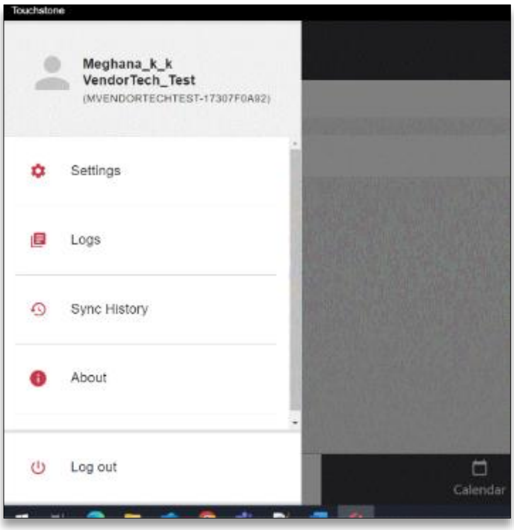
Audience:
PFM Techs, PFM Supervisors, Vendor Techs and Vendor Supervisors.

Key Fields:

System Field	Definition
Initial Sync	Occurs upon a fresh login to the app. It downloads all data that is required for the app to function offline.
Full Sync	Manually triggered by navigating to Settings>Full Local Data Refresh. Results in a complete refresh of the data.
Subsequent Sync	Any sync that isn't an initial or full sync is a subsequent sync. It can be triggered automatically or manually and is designed to download frequently changing data and update the app when the data meets specific refresh criteria.
Priority Sync	During a sync, if the user navigates to a page without the necessary data, the app prioritises fetching the data for that page. This is referred to as a priority sync.
All Work	Contains all Work orders.
Urgent Work Orders	Work orders with priority 1.
Overdue Work Orders	Work orders that are not started and are past the Planned Start date or have not finished and are past the Planned Finish date. (App looks at Actual start/finish date instead of planned start/finish dates if present.)
Nearly Due	Work orders that are not started and are within 2 days of the Planned Start date or have not finished and are within 2 days of the Planned Finish date.

Logging in to the Touchstone Mobile App

Explanation	Screenshot
1. Select from the following: **PFM Staff –** Select the **Sign-in for Programmed Staff.** **External staff / contractors** – Select the **Sign up with email.**	
2. Click **Send verification code.**	

3. Check your email and enter the code. Click **Verify code**.	
4. Verify email and **Continue**.	
5. **Result:** You are now logged into your Touchstone mobile account.	

Syncing

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Sync Feature:

Sync feature helps us to synchronise data between Touchstone Application and MAS. This is required to keep the application up to date.

Important: Remember to sync the data before you log out from the application.

Auto sync is triggered when the user navigates away from the Unplanned tab, switches between online & offline mode, or the network is established after 3+ hours since the last sync.

Manual sync can be triggered by the user at anytime provided the device is connected to a stable network and the app is in online mode.

The synchronisation details can be viewed by selecting the **Menu** button at the top-left corner and selecting the **Sync History** option. The **Sync History** page showcases the history and
status of the current and previous application syncs.

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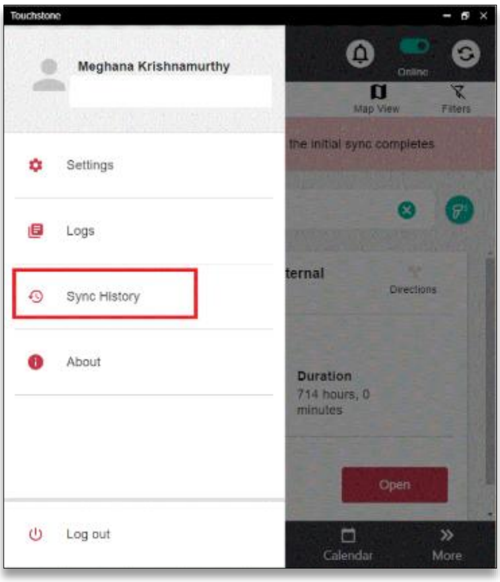
<tr><td>6. Click on **Sync History**.</td><td>



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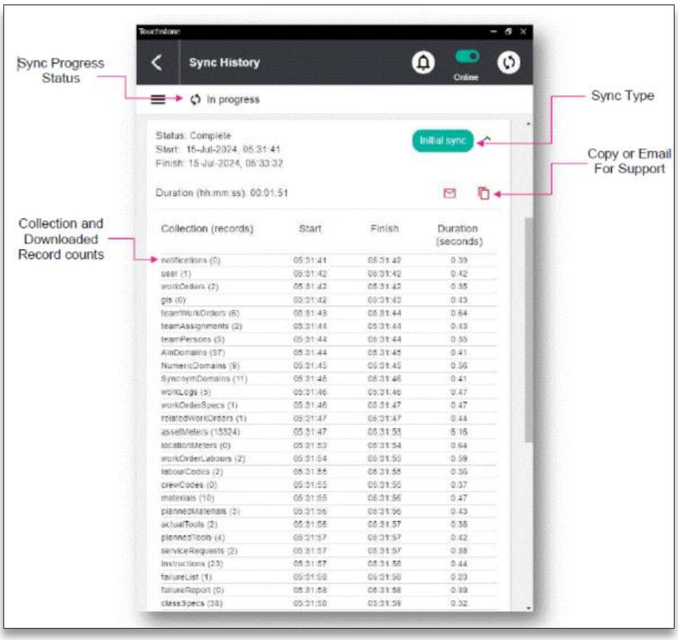
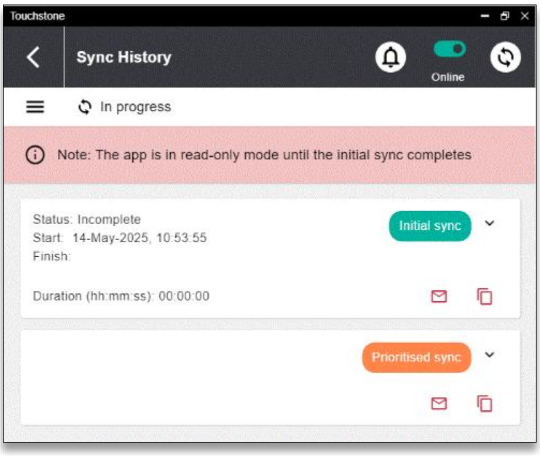
</table>

7. **Sync History** detail view.



Note : You can start modifying the contents in the app only after the **Initial Sync** is complete. Until then, the app will be in read-only mode.



Landing Page / Work List Page

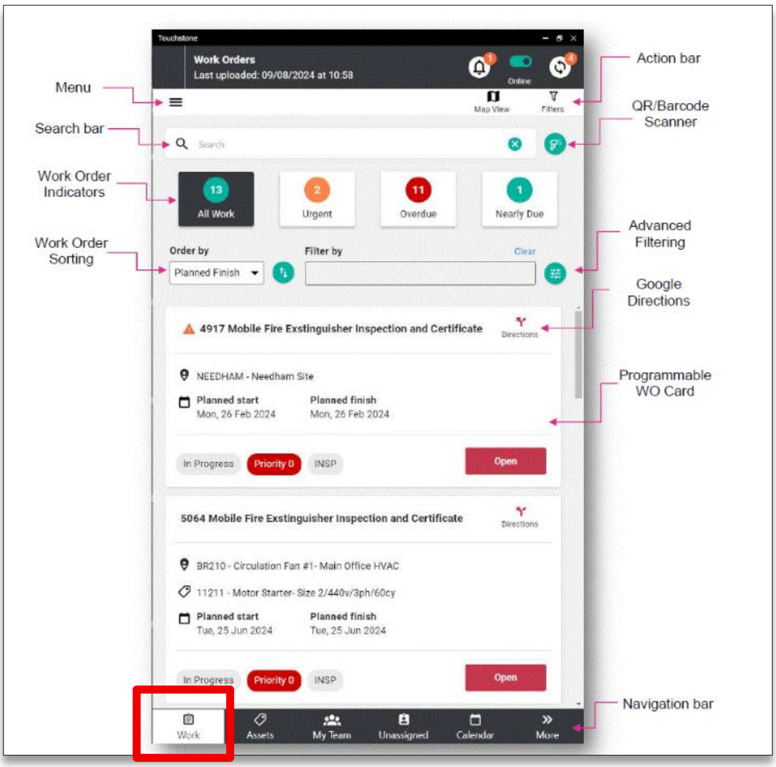
Work tab (Landing page)

The **Work** tab displays a list of workorders assigned to the user.

After successful authentication the user will be directed to the work list page shown.

The page will begin populating as the initial synchronisation downloads essential data.

The application will operate in read-only mode until all data is downloaded. Users are still able to navigate to different pages while background synchronisation continues.



1.Title bar: Displays page name and other relevant information. It contains three common actions:

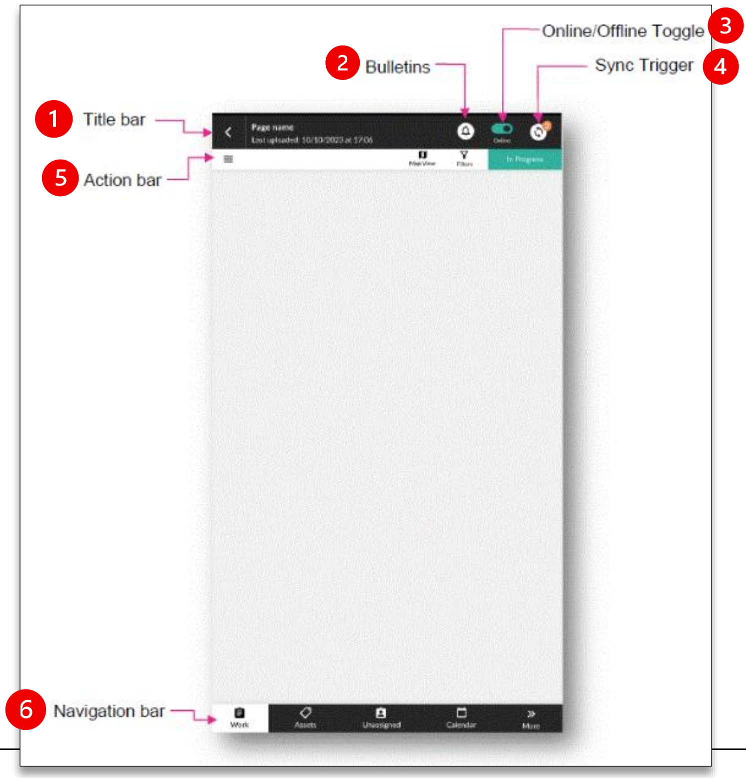
2.**Bulletins:** This is where all published notifications in Maximo can be viewed.

3.**Online-offline Toggle**: Toggles between application online/offline mode.

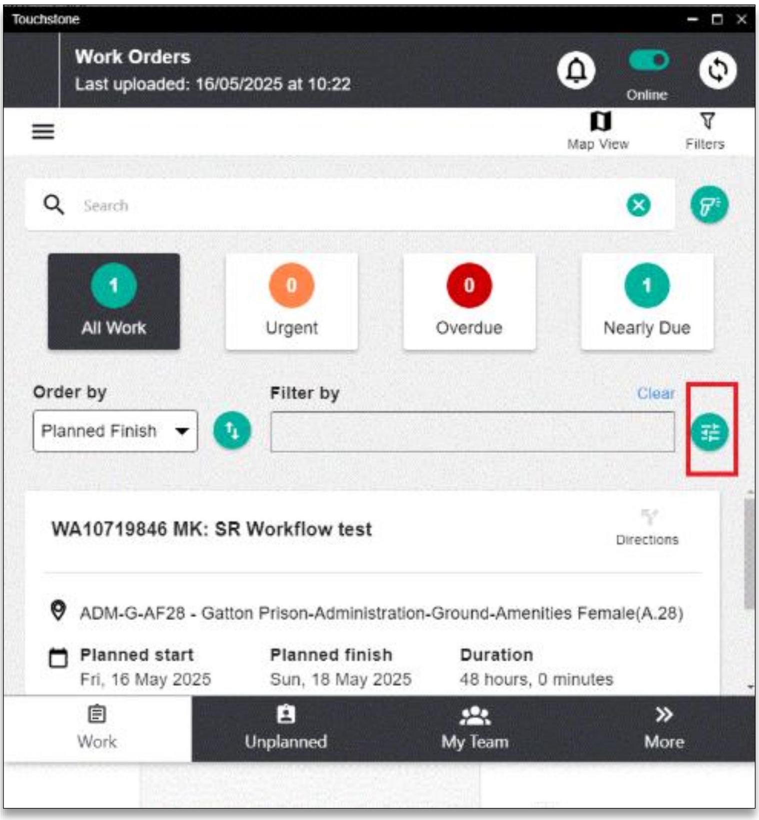
4.**Sync Trigger:** If app is operating in online mode and network is available.

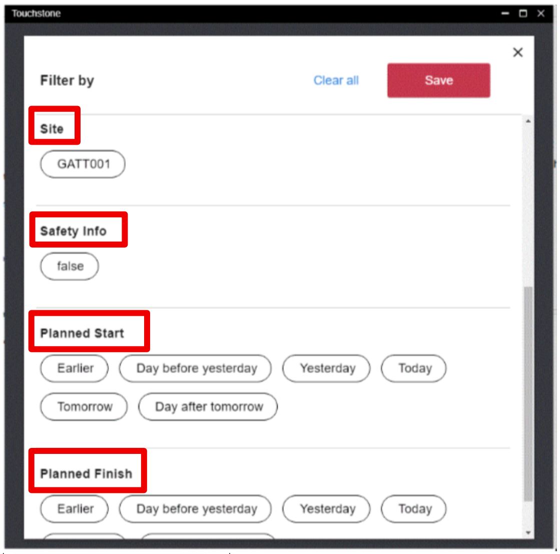
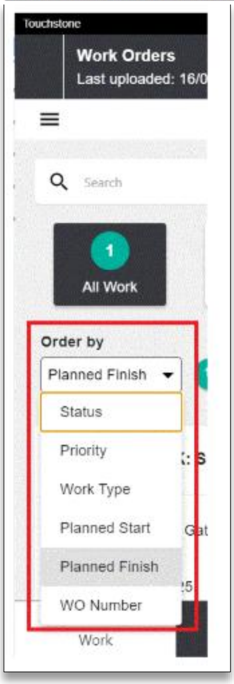
5. **Action bar:** Contains a shortcut to the Menu drawer and all available user actions for the relevant page.

6. **Navigation bar:** Displays all navigation paths available dependant on user role.



Search, Sorting & Filters

Work Order Filtering: Indicators are pre-programmed shortcuts to filter work orders by importance. **1.All Work:** Contains all work orders. **2.Urgent:** Work orders with Priority1 **3.Overdue:** Work orders that are not started and are past the Planned Start date or have not finished and are past the Planned Finish date. (App looks at Actual start/finish date instead of planned start/finish dates if present.) **4.Nearly due:** Work orders that are not started and are within 2 days of the Planned Start date or have not finished and are within 2 days of the Planned Finish date.	
Advanced Filtering: Advanced filtering **Filter by** allows users to filter work orders based on combinations of attributes.	

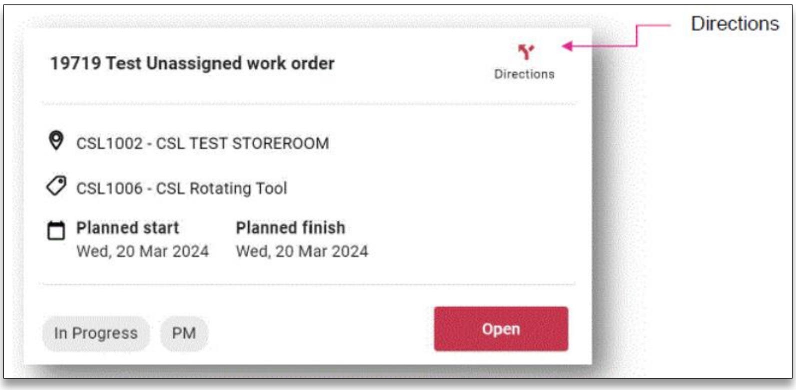
Advanced Filter attributes include: • Status • Priority • Work Type • Safety Info • Planned Start • Planned Finish	
Work Order Sorting: Work orders can be sorted in ascending or descending order based on the work order attributes shown in the list.	

Features

Directions :

If a work order includes a service address with valid x, y coordinates, the **Directions** action icon will become active.

When selected, Google Maps will open and suggest a travel route from the user's current location to the work order's location.



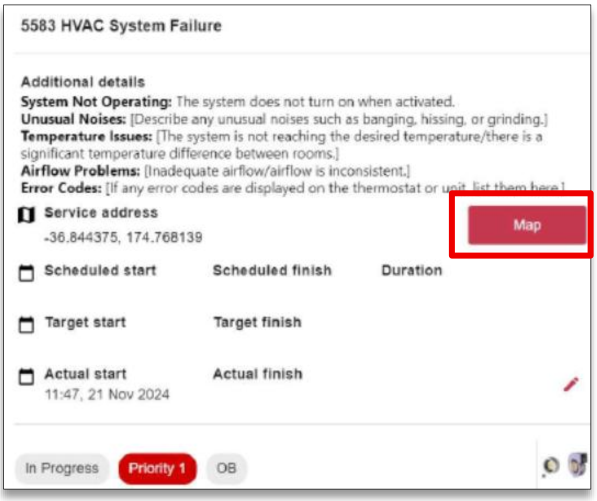
Map view:

When you tap the **Map** icon, work orders with available coordinates are displayed on the map.

For Google Maps, it shows work orders based on service addresses with x, y coordinates.

Similar to the work list view, work orders can be filtered. Users have the option to switch back to the list view as needed.

Tapping on a work order marker in the map view will open a window where users can view high-level work order details. From the navigation bar options, users can choose to open or explore the work order further.



Workorder details:

Once a work order is opened in the **Work** tab, you will be directed to the overview page as shown here.

This programmable card displays various work order attributes:

- **Additional Details:** Shows the long description of the work order if one is available.

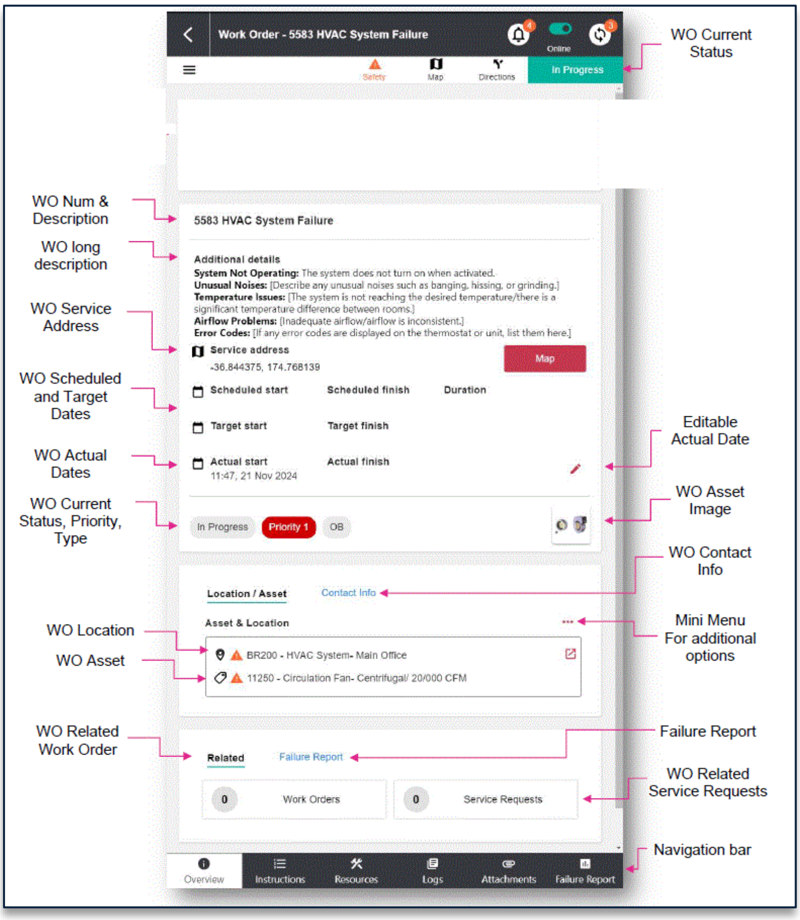
- **Service Address**: Displays the work order's service address. If coordinates are provided and a map is configured, the app will feature a **Map** button that directs users to the service location
on the map.

- **Scheduled Dates/Target Dates:** Displays the **Scheduled start** and **Scheduled finish** times if they are set.
Displays the **Target start** and **Target finish** times if they are set.

- **Actual Start/Finish Date Time:** Automatically updated by the app. The **Actual Start** time is recorded when the
work order begins, and the **Actual Finish** time is recorded upon completion. The app will not overwrite these times if they already exist in Maximo.

- **Editable Dates:** Users can edit **Actual Start** and **Finish Date Time** once the work order has started.

Related Work order and Service Requests : Technicians can create related work orders or service requests by entering the necessary details. The newly created work orders and service requests will include a related link, allowing for easy identification of their relationships.

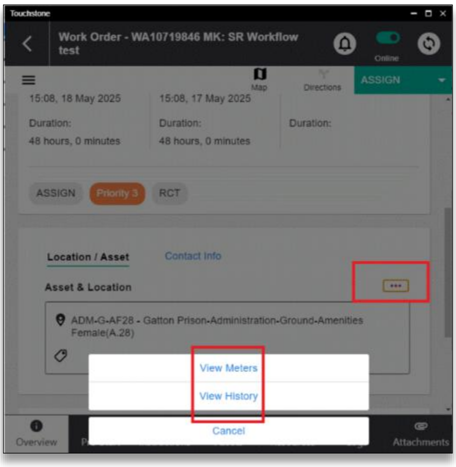


Location and Asset : The Location and Asset card shows the currently assigned location and asset for the work order. To select or update a different asset or location, select the 3 dots **(…)** located at the top right of the card.

This programmable mini menu allows access to the following:

• **View Asset Details:** Only available if the work order contains an asset.

Technicians can update asset meters, create service requests to modify core or additional attributes, add new assets, or create asset-related service requests or work orders.
• **View Meters:** Lists the meters associated with the work order's current asset and location. Technicians can update the meter values here.
• **View History:** Shows historical work orders related to the current work order's location and asset.
• **Contact Information:** The Contact Info card provides relevant contact details for the work order, allowing the technician to reach the appropriate person.



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Work Order Hazard and Precaution

When hazard information related to the work order is available, a **Safety** icon will appear on the action bar.

Selecting this icon will display all relevant hazards and precautions associated with the work order, its location, and its asset.

Users can also select the **Safety** icon next to a specific asset or location to view hazards and precautions pertinent to that asset or location.

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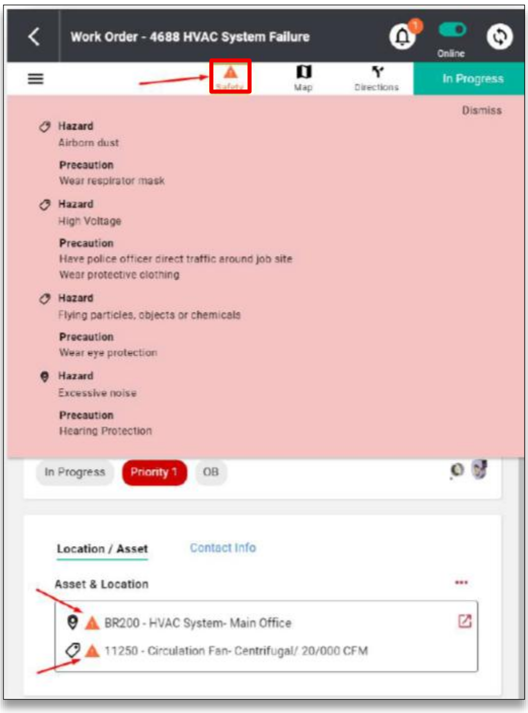

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Pre-Start tab:
A Pre-Start form is completed by a technician before starting work on a work order. Businesses can choose to enable this feature in their application and may also make it a required step in their workflow.

If a business opts to enforce this requirement, at least one Pre-Start form must be completed prior to starting the work order. For example, if a work order is in **Approved** status, the technician must fill out the **Pre-Start Inspection Form** before moving it to **In Progress** status.

The business can pre-define which forms (classifications) can be used for pre-start task creation. To fill out a new **Pre-Start Inspection Form,** ensure the parent card is expanded, then tap the **+ Pre-Start** icon in the action bar.

Next, select the required form type from the classification selector—this will display the relevant questionnaire for completion. Once saved, a new task will be added to the work order. If prestart

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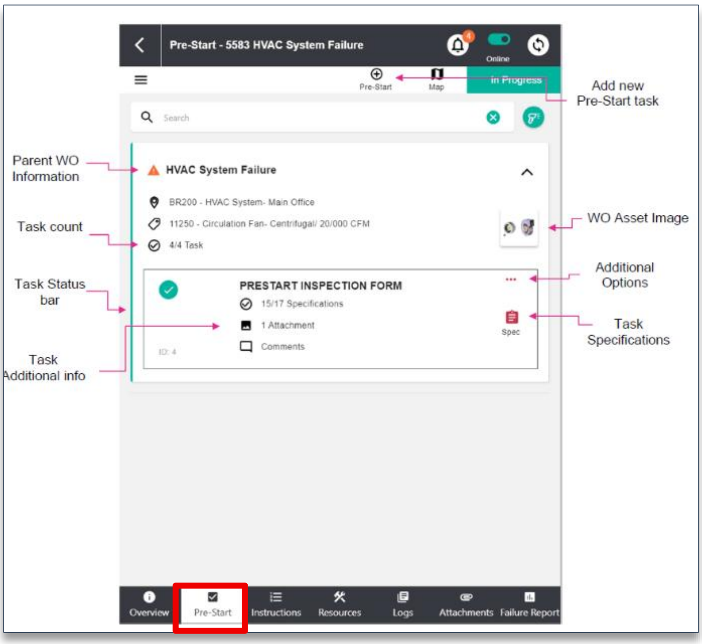

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<tr><td>task is a requirement; the business can choose to add a pre-start task via a job plan.</td><td></td></tr>
<tr><td colspan="2">A task is only considered complete when all mandatory specifications are answered and it has been marked as passed.

Once the task is synced, it will become non-editable from within the app.
Tasks are displayed under the parent work order card. Each task will only include a Pass button to indicate its completion status. If the same digital form (classification) is applied via the Instructions screen, then the same task can have a pass and fail button.

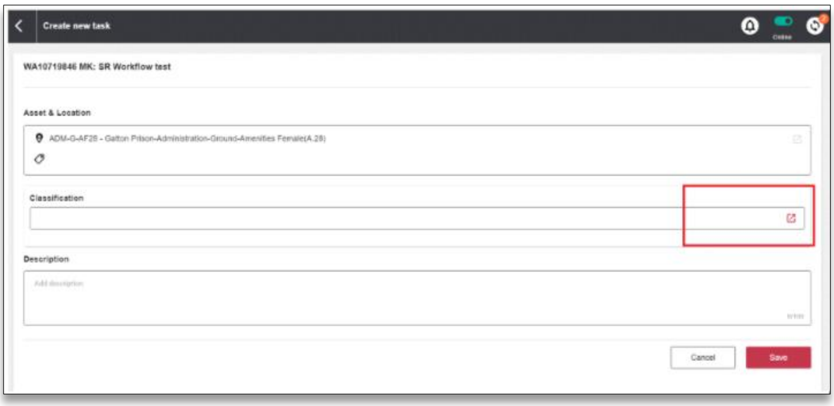
• Passing a Task: If a task has associated mandatory specifications, these must be completed before the task can be marked as passed.
• Task Additional Info: Additional task information can be accessed via the Mini menu => View/Edit Task
• Task Attachments: Attach task-specific files as needed.
• Task Comment: Include additional notes.
• Order of display:
➢ The application places the parent work order at the top of the page.
➢ Tasks are listed under the parent work order, ordered by sequence number. If no sequence number is available, the Task ID is used. The application will assign the next available sequence number when a new task is added.</td></tr>
<tr><td>Add a new task:

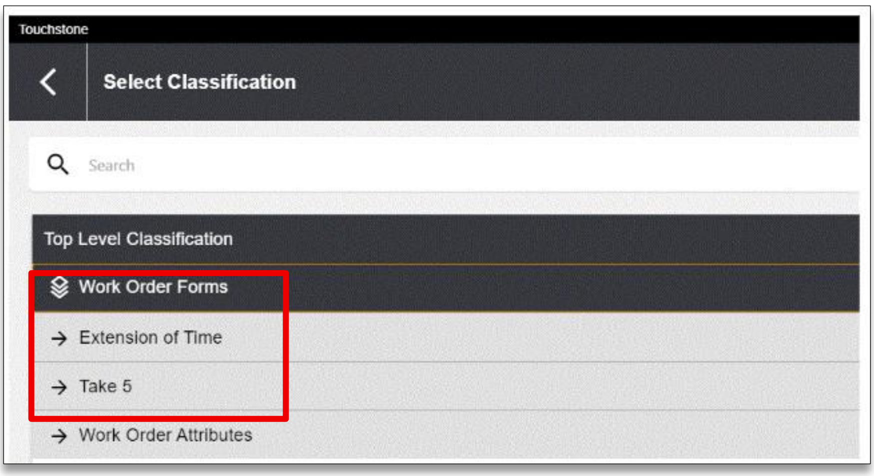
To add an additional task, select the Add New Task icon in the action bar. The new task will be added to the currently open work order card.

Users can classify the task at the time of creation to attach the relevant questionnaire to the new task. Once the task is added, all mandatory specifications must be answered before the task can be marked as passed.

Click on the Classification option to specify one of the following:

1. Extension of Time
2. Take 5
3. Workorder Attributes</td><td>





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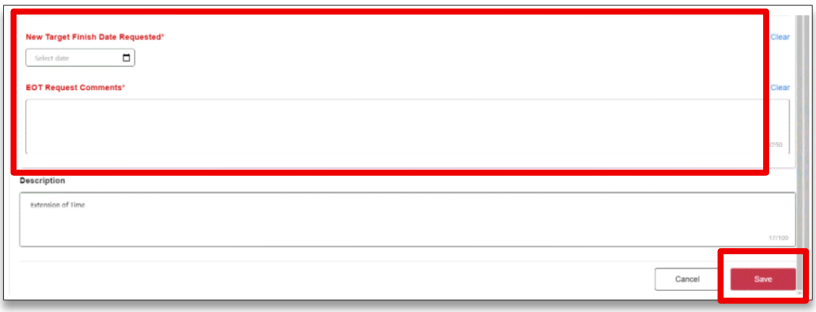
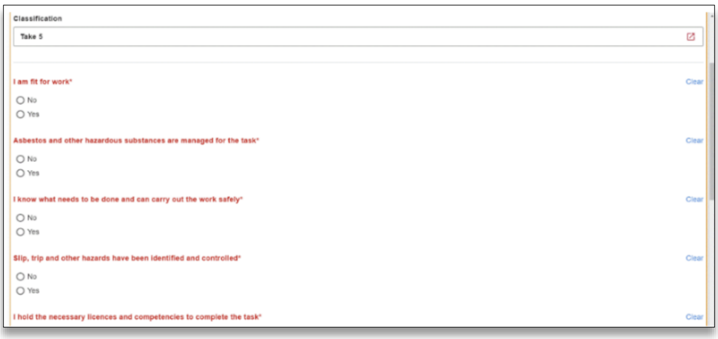
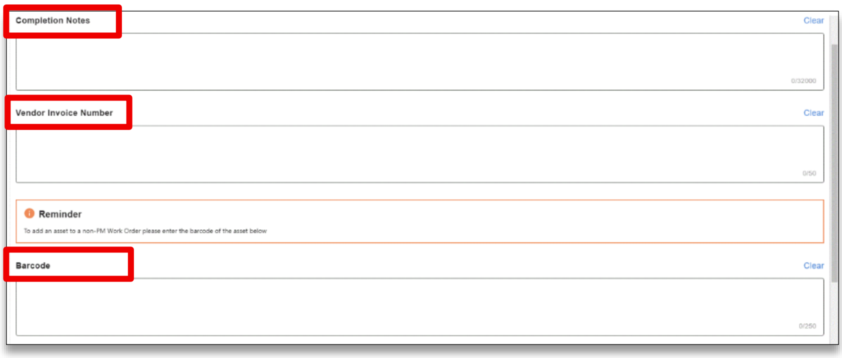
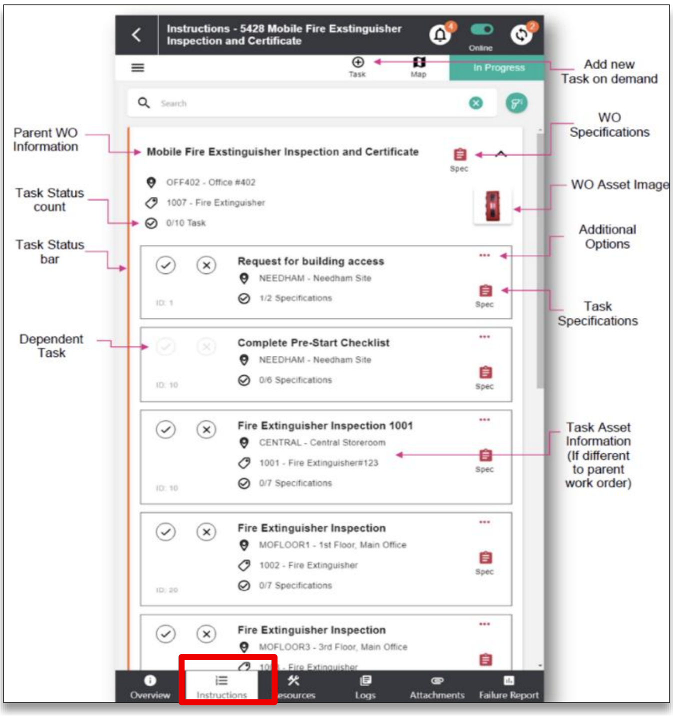
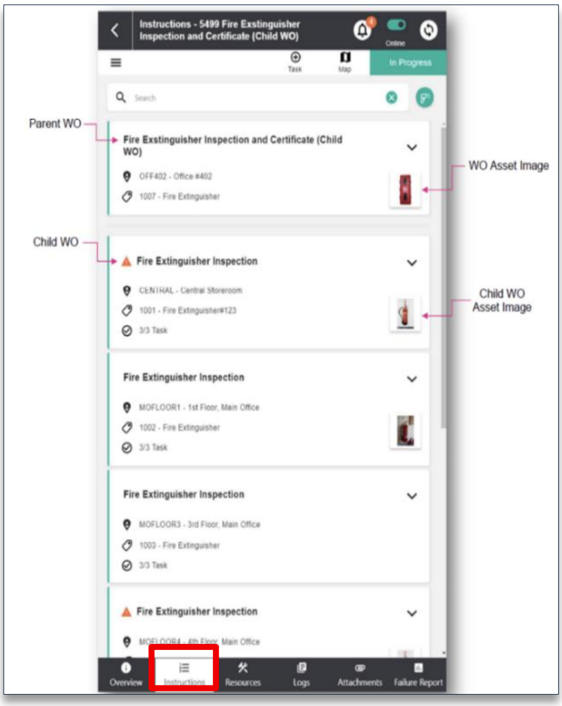
Extension of time: Request additional time for a workorder which has started. Enter the details in the form. **New Target Finish Date Requested** and **EOT Request Comments** are mandatory fields. Click **Save.**	
Take 5: Users must complete a Take 5 for every site visit. Completing this form allows the Take 5 to be added to the WO.	
Work Order Attributes: Workorder attributes allow you to add **Completion Notes** which is a mandatory field in order to close a Workorder. A **Vendor Invoice Number**, **Barcode** and **signature** can also be added here.	

Instructions tab:

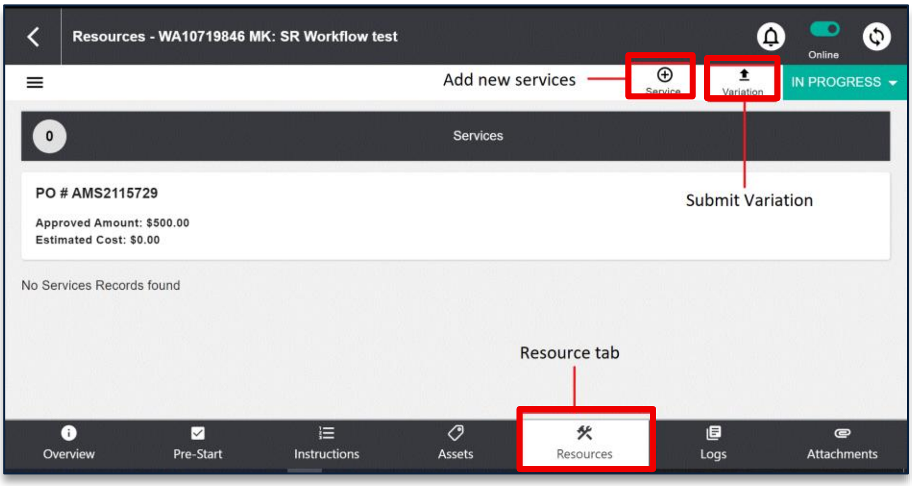


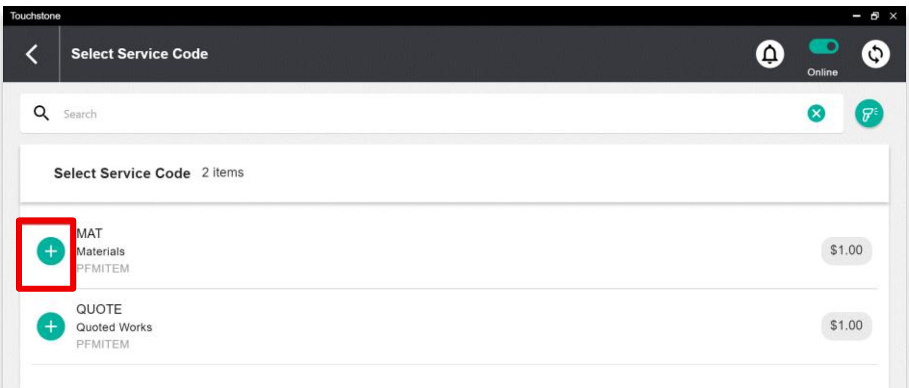


Resources tab:

Variation: Click on the **Variation** icon to submit a variation on service codes.

Services : Users can add new service codes to the existing workorder. Click on **+ Service** within the Resources tab. Then click on the **+** next to the service code you would like to add.





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Claim:

Select **Claim** (Supervisors only) to submit claim.

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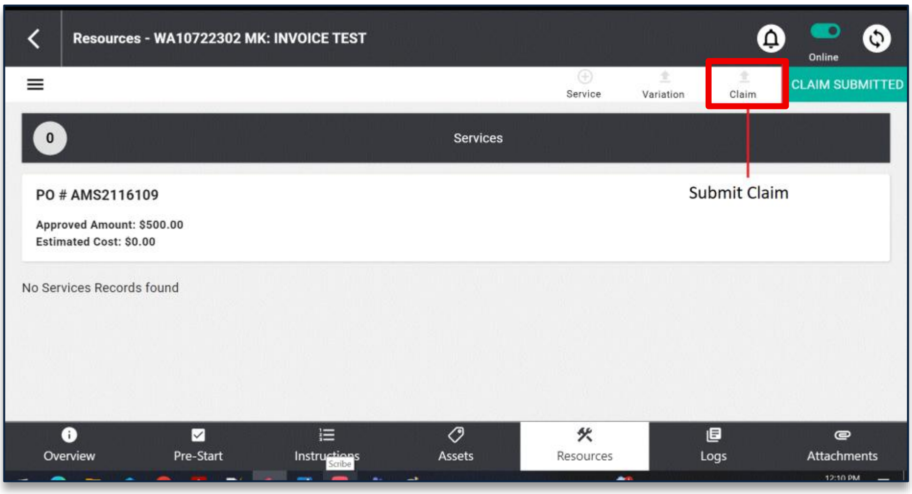

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Work Logs tab:

Click on the **+ Work log** icon to add logs.

Work order logs can be previewed here, and users can also add new logs.

Users can choose from different log types and specify whether the log is **client-viewable** or not.

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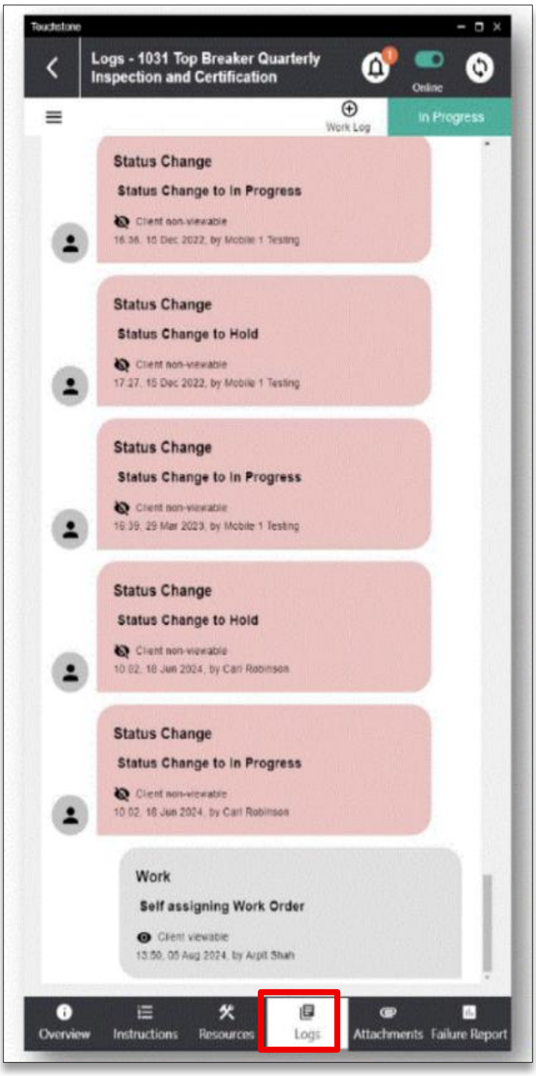

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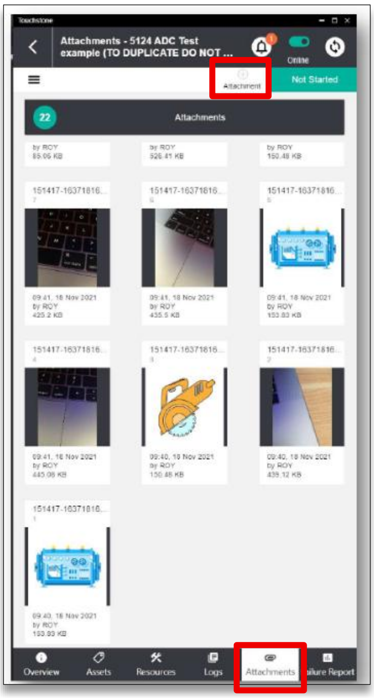
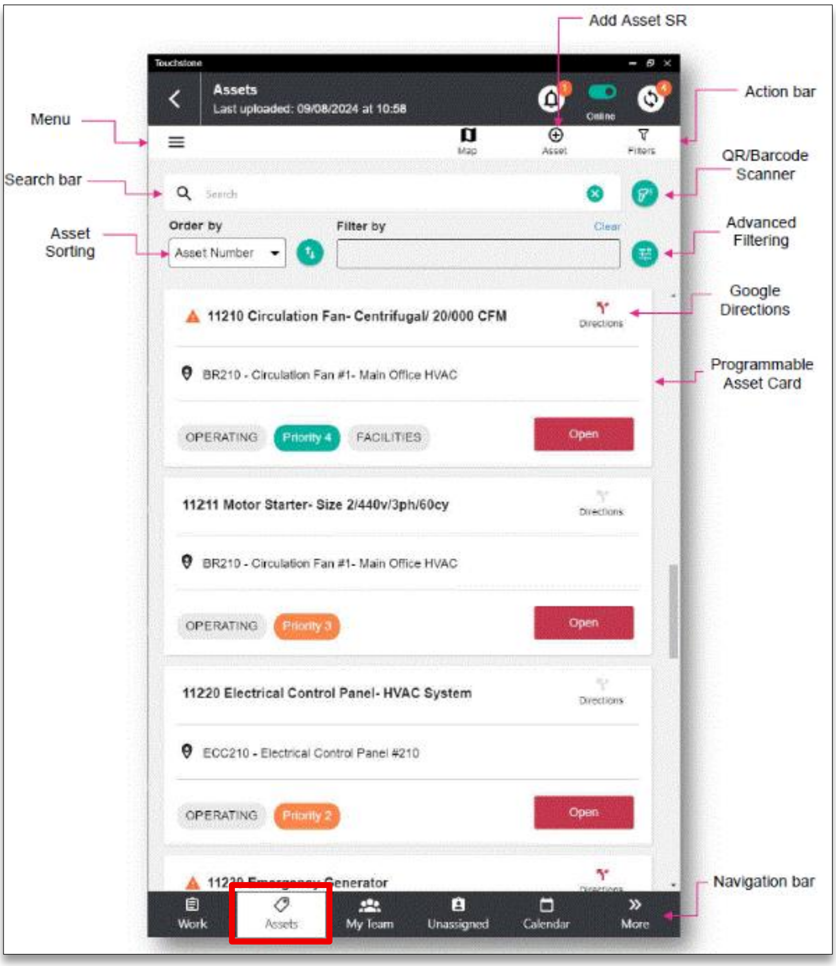
Attachment tab: From this page you can view and add attachments related to work orders, child work orders and tasks.	
Assets tab: Scan QR code, barcode or type text into the search bar to filter assets. The following keys can be used for searching. • Asset ID • Asset description • Location ID • Location description • Asset status • Asset Type	

Related Work Instructions or Process Maps:

VUM-WI-0010-External User Management
VUM-WI-0020-Activating & Downloading the Touchstone Mobile Application
VUM-WI-0030-PFM User Management
TSMob-WI-0020- Work Order Management (Supervisors)
TSMob-WI-0030-Work Orders (Technicians)
TSMob-WI-0040-Create and Submit Claims
TSMob-WI-0050-Asset Management in Touchstone

History			
Description	**Reference #**	**Date**	**Authority / WI Owner**
New Work Instruction		19th May 2025	Programmed Facility Management
Next Review Due		Upon new release	