# PMWeb Mobile™

PMWeb Mobile Version 6.0

# Introduction

*Important Note: This document refers to PMWeb Mobile version 6.0.*

PMWeb Mobile™ is a light, responsive, application that lets you read, edit, and add PMWeb records using mobile devices—smartphones, phablets, and tablets. PMWeb Mobile screens are specially formatted to look their best on these devices and the app takes advantage of the unique features that mobile platforms provide. PMWeb Mobile runs on the iOS and Android operating systems and can be downloaded from the iTunes Store and Google Play.
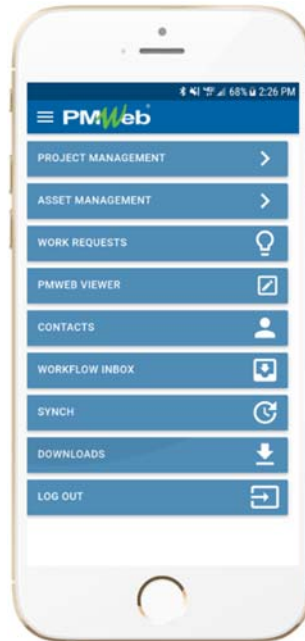


PMWeb Mobile can be used in real time—while actively connected to a PMWeb database—as well as offline. Offline edits are saved on the device until a database connection is available, when PMWeb Mobile can automatically synchronize your data.
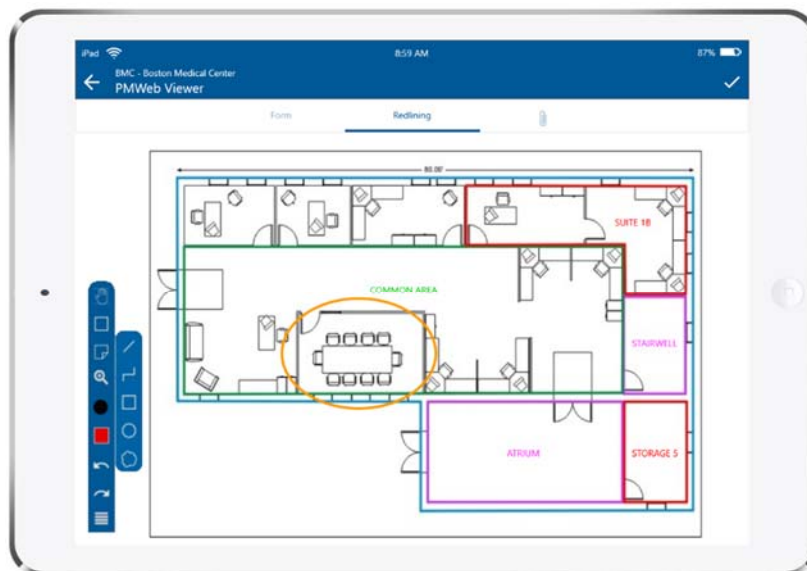
### What is Included

The following features are available in PMWeb Mobile:

- Safety Forms
- RFIs
- Daily Reports
- Punch Lists
- PMWeb Viewer
- Work Orders
- Work Requests
- Contacts
- Workflow Inbox

Remember that all record permissions and security settings from the PMWeb database are honored by PMWeb Mobile so access to records and features listed above may be limited.

# Installing PMWeb Mobile

Connect your device to either the iTunes Store or Google Play and search for "PMWeb Mobile". Follow the store's protocols to download and install the app.

# Connecting to PMWeb

The first time you open PMWeb Mobile you are prompted to create a database connection. Enter the URL to your PMWeb database in a format similar to this one:

**"http//myserver.pmweb.com/6_0_00/pmweb-m"**

Note that "-m" must be appended to the URL.

PMWeb Mobile is version-specific: the version of PMWeb Mobile must match the version of PMWeb you are connecting to. PMWeb Mobile is not designed to work with PMWeb versions earlier than 6.0.

When the URL is entered correctly PMWeb Mobile automatically detects the databases available on the server. Use the Select a Database list to choose yours and then click the Continue button to navigate to the Login page.

*Important Note: URL and database information is automatically saved for you. To change any of this information in the future click the Change Server and Database link on the Login page.*

# Logging in to PMWeb

On the Login page type your user name and password and then click the Login button to navigate to the Main Menu. If you wish, activate the Remember Me switch to avoid having to enter your credentials each time you open PMWeb Mobile.

# Using PMWeb Mobile

Use the buttons on the Main Menu to navigate the features of PMWeb Mobile. The buttons that you see depend on the modules that are licensed and your security permissions in the PMWeb database. Some feature buttons appear on more than one menu. The Project Management and Asset Management buttons contain sub-menus. Before using most of the features on the Project Management sub-menus you will be prompted to open a project. Only records for the project that is open will be shown when you click the sub-menu buttons. To log in to a different project at any time click the Project link in the header bar.
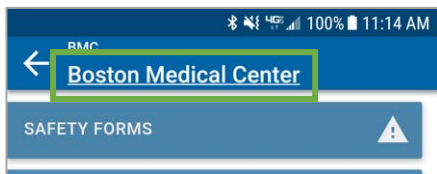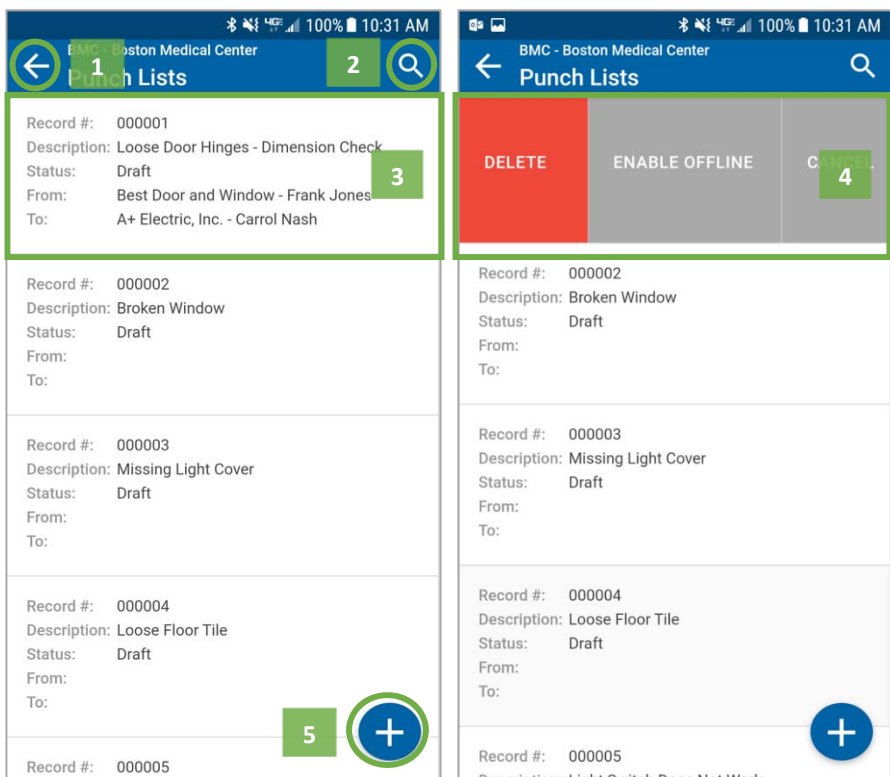


*Figure 1 - Click the Project Link to Open a Different Project*

## Using the Records List

Tapping most buttons opens a list of records:



Possible actions from record lists include:

1. Tap the Back (left arrow) icon in the header bar to navigate back one level
2. Tap the Search icon in the header bar to open the filter field
3. Tap a record in the list to open it
4. Swipe left to open record commands (screenshot above right)
5. Tap the floating Add button to open a new record

## Using Tabs within Records

As in PMWeb, when adding a record in PMWeb Mobile you need to enter and save data in the Form tab (the record header) before you are allowed to enter data in the Details or other tabs.

Details tabs include a list of record lines:
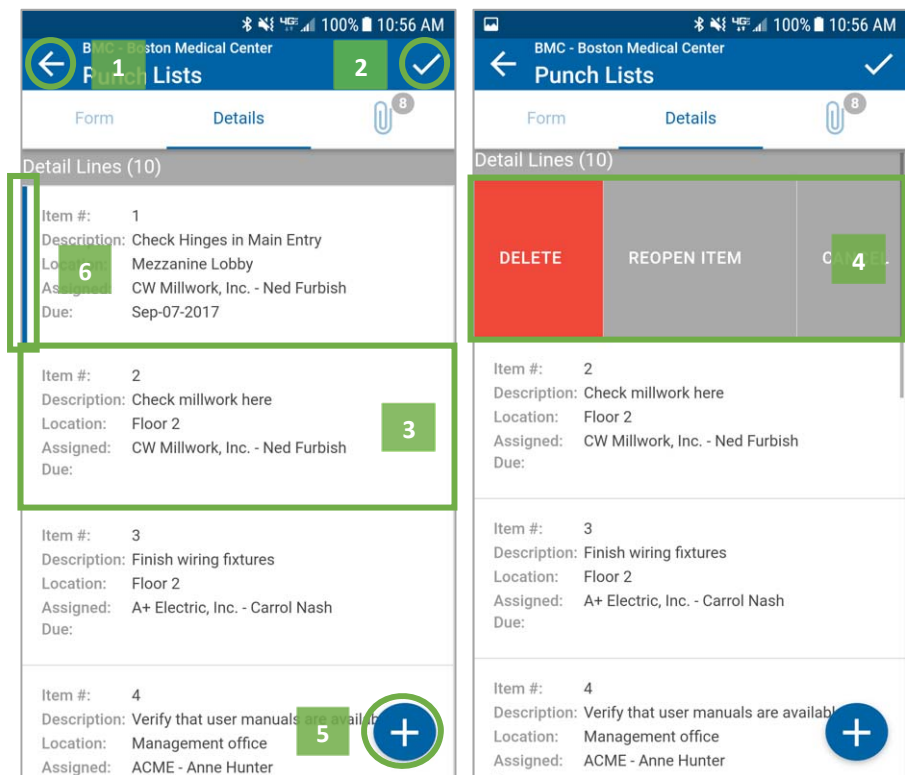


Possible actions include:

1. Tap the Back (left arrow) icon in the header bar to exit the record and navigate back one level
2. Tap the Save (checkmark) icon in the header button to save the current tab
3. Tap a Detail Line to open it
4. Swipe left to open line commands (screenshot above right)
   o **Delete** – Deletes the record line (does not delete the entire record)
   o **Reopen Item** – In the case of a Punch List item, this toggles between close and reopen
   o **Cancel** – Closes the command bar without taking further action
5. Tap the Add floating button to open a new line

In Punch List Details the vertical blue bar to the left of a line (6) indicates that the line has been closed.

# Using Offline Mode

PMWeb Mobile lets you view, edit, and create records while your device is disconnected from all networks. When you reconnect to a network and to your PMWeb database PMWeb Mobile's synch feature can automatically integrate your mobile data with live PMWeb data. Follow these steps to use PMWeb Mobile in offline mode:

## Enable Offline Mode

From the Main Menu tap the settings icon to the left of the PMWeb logo in the header bar. Activate the Enable Offline Mode switch.
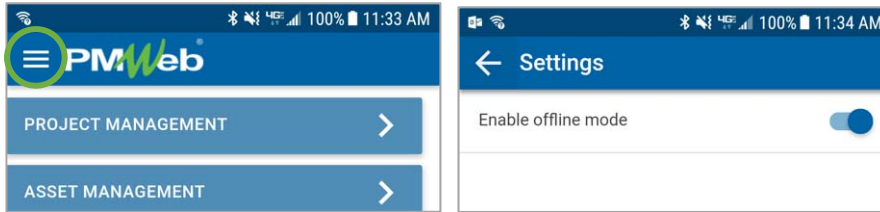


When you enable the switch a message is displayed explaining that this requires downloading and saving PMWeb to your device. You must acknowledge this message in order to enable offline mode.

In order to operate in offline mode PMWeb Mobile must have access to commonly used lists and certain other PMWeb data. When you enable offline mode this background data is downloaded to and stored on your device. In most cases downloading and storing this data is not an issue but be aware that for large PMWeb databases the amount of data can be significant. PMWeb, Inc. is not responsible for network or storage fees incurred by using PMWeb Mobile. To minimize data transfer, Cost Codes is one list type that is not downloaded and stored. As a result, Cost Code fields are not available in offline mode.

Data that is downloaded when offline mode is enabled includes:

- Projects
- Locations
- Portfolio/Lists/Lists data for the record types used in PMWeb Mobile
- Companies
- Contacts

### Enable Offline Records

To view and edit existing records offline you must enable them for offline mode while PMWeb Mobile is still connected to the PMWeb database. To do so:

- Swipe left on a record in list view to open record commands (see screenshot below, left)
- Tap the Enable Offline command
- In the confirmation box tap the Download link. A progress bar appears to the left of the record. Records for which offline mode has been enabled will show a full progress bar as in the screenshot below, right.
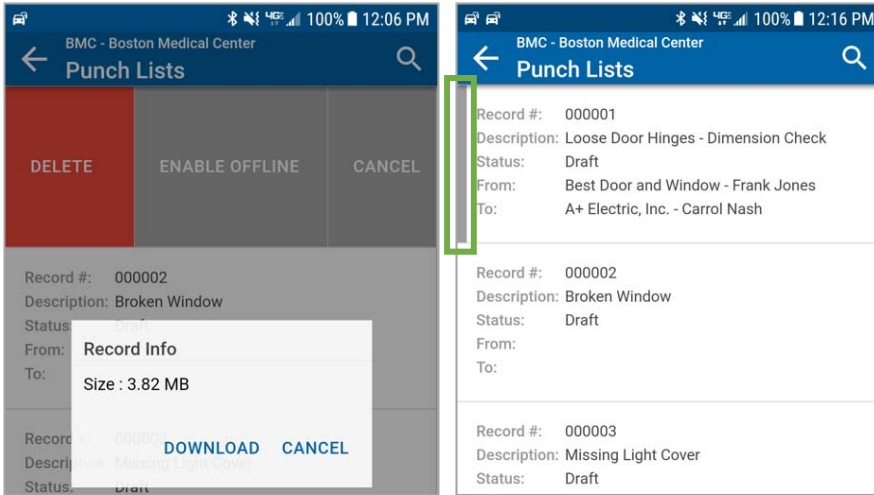


When you enable a record for offline mode PMWeb Mobile downloads and stores the data within the record itself as well as all document attachments (link attachments are not downloaded). The size data displayed in the confirmation box represents the sum of the record data and its attachments.

### Working Offline

If offline mode is enabled, when no network connections are available PMWeb Mobile displays the message shown in the screenshot below, left. Tap the Offline Mode link to continue. While PMWeb Mobile is in offline mode the menu bar is gray rather than blue (see screenshot below, right).

In offline mode you can view, edit, and delete any records that you previously enabled for offline use as well as create new ones. Only records enabled for offline use, or created during the offline session, appear in list view.
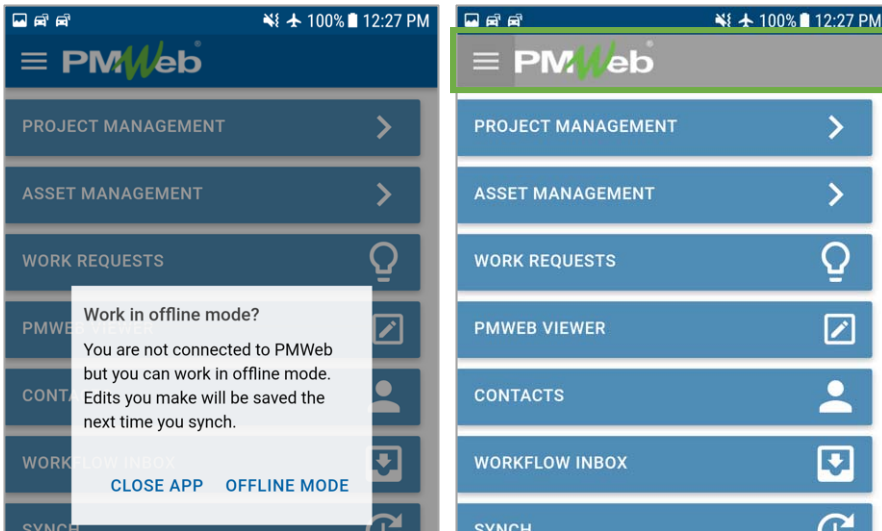
*Important Note: In offline mode, Workflow Inbox records are read only.*

When working in offline mode, each time you click the Save icon the message in the screenshot below is shown.
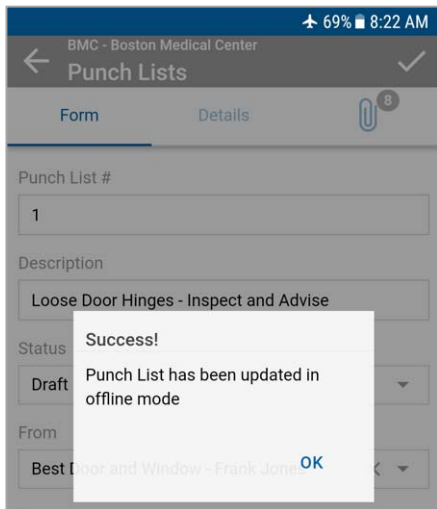


## Going Online

When the device is again connected to a network PMWeb Mobile displays the message shown in the screenshot below. Tap the Go Online link to activate the connection to your PMWeb database.
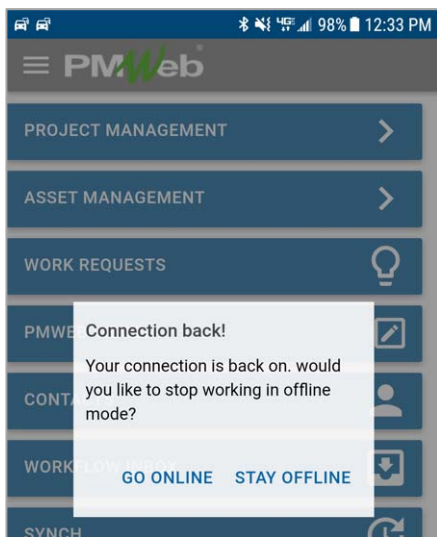


As soon as you go back online record lists are refreshed to show all of the records you have access to, not just the ones for which offline mode is enabled.

Edits you make after going back online are immediately saved to the PMWeb database *but the edits you made in offline mode still need to be synchronized with live PMWeb data*. To do so, follow the procedure outlined in Synch.

*Important Note: Offline edits are not automatically included in your PMWeb database when you reconnect and go online. After reconnecting, use the synch function.*

## Synch

To synchronize your offline edits with your PMWeb database use the PMWeb Mobile synch function. With the device in online mode tap the Synch button on the Main Menu. A list of all records currently enabled for offline mode as well as any records created while in offline mode appears.
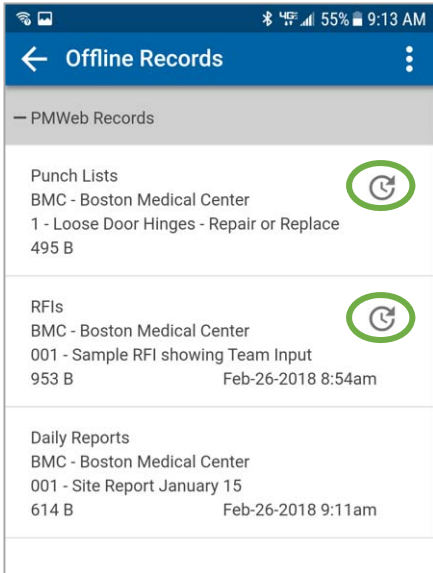


*Figure 2 - Two Records Need to be Synched*

In the screenshot above Synch icons indicate that two of the offline records—the Punch List and RFI—have been edited while in offline mode and need to be synchronized with the PMWeb database. The Daily Report was not edited in offline mode and does not need to be synched. To synch all offline records tap the Menu icon (the screenshot below, left) and then tap the Select button.
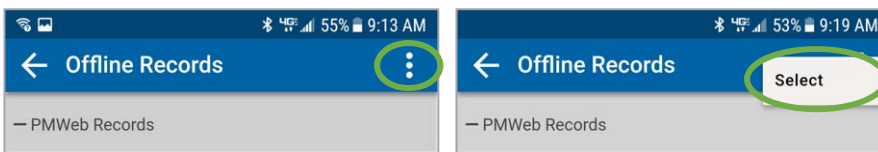


All of the records in the list are selected and the Synch button appears as in the screenshot below. Tap the Synch button.
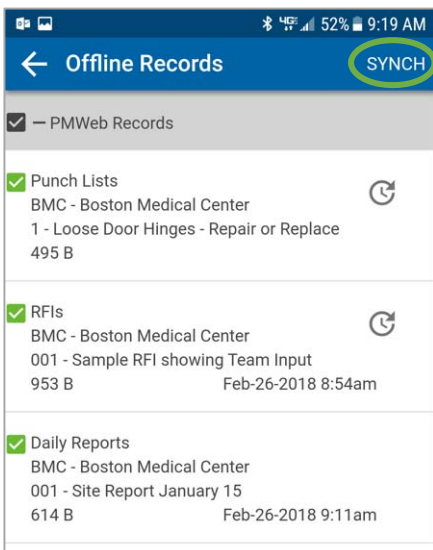
After you tap the Synch button progress bars appear below each selected record in the list.
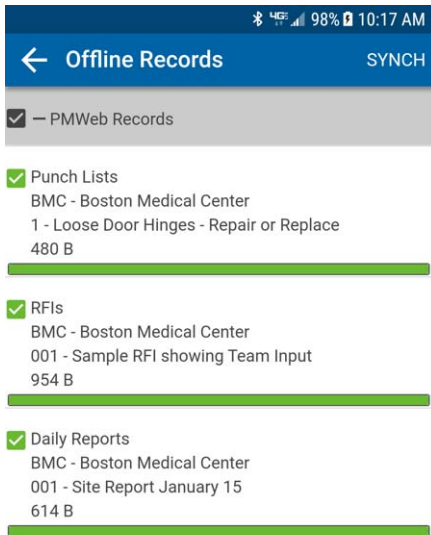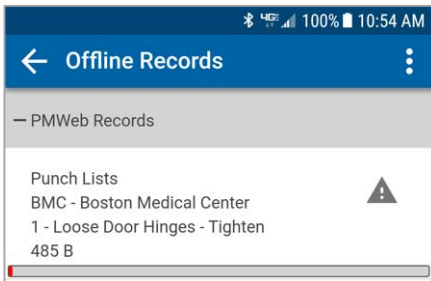


*Figure 3 – 100% Progress Bars for Selected Records*

For successfully synched records the progress bar will be completely filled with green and the Synch icon will have disappeared. If a record cannot be synched the progress bar will remain gray or will show some amount of red. Also, the Error icon will appear as in the screenshot below.



Tap the record to display the error details:
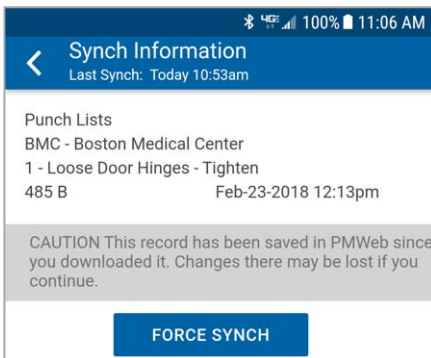


Tap the Force Synch button if you are sure you wish to proceed. A confirmation message will appear:

Tap Force Synch to continue.

See Understanding Synch for information about synch errors.

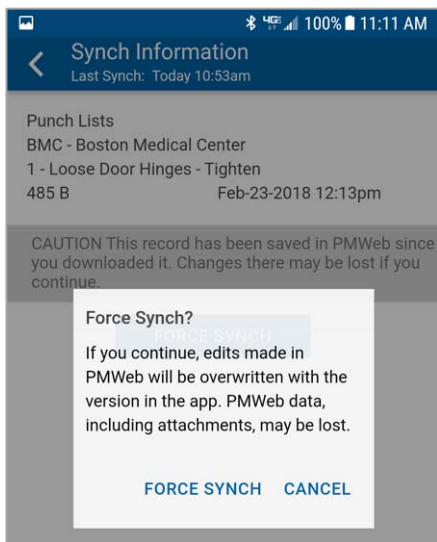You can also swipe left on an offline record to display record commands.
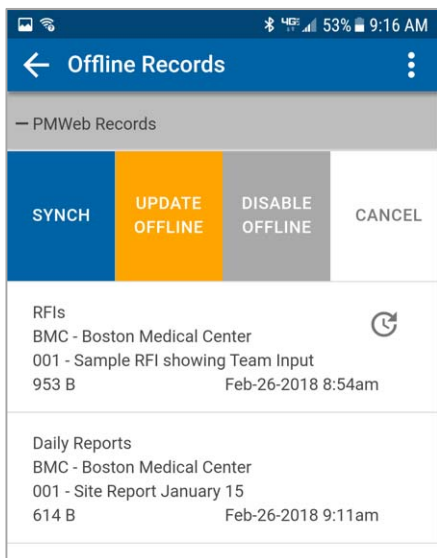


*Figure 4 - Record Command Bar*

- **Synch** – Use this command to synch the record without using the select procedure described above
- **Update Offline** – Sends the latest data from the record in the PMWeb database to the offline record
- **Disable Offline** – The record will no longer be available to view and edit in offline mode. If the record has not yet been synched selecting this command abandons offline edits. This command also deletes the record and attachments saved on the mobile device, freeing up storage space.
- **Cancel** – Closes the command bar without taking further action

### Understanding Synch

Synchronizing data entered offline in PMWeb Mobile with data that resides in the PMWeb database offers several challenges. First, and foremost, is that PMWeb data must never be compromised in the exchange. The synch function in PMWeb Mobile uses discrete data transactions to ensure that they can be "rolled back" if they are unsuccessful for any reason including being abandoned by the user.

PMWeb Mobile must also enforce all permissions granted to the user, both when allowing records to be viewed and downloaded for offline use as well as when synching edits to them later. Because these events—downloading and synching—occur at different times there is the very real possibility that in the intervening period the user's permissions surrounding the records may have changed. The synch function must account for those potential changes.

When synching, all business rules must be observed. These include rules encoded in the PMWeb system as well as those configured by user-selected settings. Two general business rules governing PMWeb Mobile synch are:

1. Records deleted from PMWeb after being downloaded to PMWeb Mobile cannot be synched. In other words, if synching would result in a deleted record being added back into PMWeb it will be blocked. In this case the synch transaction for this record will fail and cannot be completed. Use the Disable Offline command to remove the record from PMWeb Mobile.
2. If the record has been saved in PMWeb after it was downloaded to PMWeb Mobile the user is notified and required to knowingly override the business rule blocking synchronization. The user is actually required to override this business rule twice per record—first by tapping the Force Synch button in the Synch Information page and then again in the confirmation message. See Synch, above, for screenshots of the Force Synch procedure.

Some situations that can result in synchronization failing include, but are not limited to:

- The record was deleted from the PMWeb database
- The PMWeb Mobile user no longer has security rights to:
    - o the record (if it was downloaded from PMWeb)
    - o the project or location
- Required fields are not completed
- The record is in Workflow
- The record has been saved in the PMWeb database since it was made offline in the app. In this case, the information page will include a "Force Synch" button with a confirmation.
- The connection was interrupted. In this case, the information page will include a "Try Again" button.

## Downloads

The Downloads page opened from the Main Menu lists all attachments downloaded from PMWeb records while working in online mode. Use this page to view all downloads as well as to delete them from your device to free up storage space. To view an attachment, tap it. To delete it, swipe left and select the Delete command. This only deletes the downloaded copy of the attachment—it does not affect the attachment on the PMWeb record it was downloaded from.

As stated above, this page only includes files downloaded in *online* mode. Attachments saved with files in offline mode can be viewed by opening the respective records and navigating to the Attachments tab. Disabling offline status for these records (see Synch, above) deletes the saved record and its attachments, freeing up storage space on the device.