**3\_Mobile Apps Showcase**

0:00
I finally got my first cup of coffee.

0:02
So I'm feeling especially mobile right now.

0:05
Which leads me to our next session, which is Mobile Apps Showcase presented by Mr.

0:11
Shang Weisinger.

0:12
Shang, good morning.

0:14
Are you feeling mobile this morning?

0:17
Absolutely.

0:18
Am I have that Who song rattling around my head.

0:22
All right, take it away.

0:23
All right, so get this on the screen here.

0:29
OK, so thank you Ranger Ring and hello to all my fellow climbers.

0:36
Thanks for joining me on this leg of our Elevate journey.

0:39
It's kind of an appropriate topic considering how our guide has kept us moving and kept us mobile all through this Elevate event.

0:46
So hopefully at this stage in this elevation, no one is too short of breath and we can keep going.

0:51
So come along with me and we'll take a look at our mobile solutions and see how they can help your organization keep moving as well.

1:03
So what we're going to talk about today is just what are the perform apps and or if you're in the asset works or on the yeah, on the aim side, they're going to be the go apps.

1:14
How does where could perform possibly fit into your organization right?

1:19
What, how, what would do how, how would it make sense for me to use?

1:22
And then we're going to kind of climb into perform and see some of the new stuff that's been added to it, as well as just some of the overall functionality and how it can integrate with what's going on in your organization.

1:33
So as you know, this is our product line and perform is it one of our stand alone products that we that we we sell, but what is perform?

1:42
So at the at the outset, perform was purpose built, meaning we wanted to make sure that it's easily adoptable by the folks in the field and not cumbersome for them to use.

1:54
We want to optimize for that field use.

1:57
So think about it.

1:58
If you're out in the field and you're, you're someone out there working with gloves on, you don't want to be interfacing with, with a mobile app and having to do a lot of typing and, and activity with that mobile device.

2:10
We've optimized it to where they can with minimal strokes and effort and, and, and keying, they can get to and execute the work that they're assigned.

2:20
It's also persona driven, which means we focus the apps on what a particular role would do to execute work away from their desktop or laptop.

2:28
So the apps aren't trying to be all that aim and operate are, they're just focusing on key actions to execute the job at hand and it's fully integrated with operate aimed.

2:39
So what that means is because the apps are connected with operate, you get real time data input and exchange.

2:46
So this is providing current information on work status, any issues that may arise, material requests, purchases, so you that's real time data that you may not be getting now.

3:00
And the apps are interconnected, so the apps know about each other, so they know which one is responsible for what actions and when.

3:09
And it is iOS based.

3:10
So really don't have much more to say than that.

3:13
But of course we know that all our operate name system can be run on any platform on any device.

3:20
But we made the decision to put the mobile apps, they seem to be a make better sense to be on the iOS platform.

3:32
So if you're not aware, meet the family.

3:35
We have 6 apps and they all kind of are self-explanatory.

3:38
Work is for those activities around work orders and phases in the field.

3:42
Asset management is around just managing that asset condition information, location information.

3:48
We have inventory functionality where you can do counts and releases and picked lists material requesting and is essentially purchasing material receiving is receiving those purchases and then capital improvement.

4:02
Your, your, your project managers in the field to be able to do inspections and respond to timesheets or workflow steps.

4:09
See documents make you know issues to make issues out in the field.

4:14
So again, very targeted functionality around what you need to do.

4:18
And because they are all interoperable, if let's say you're in perform work and you need to access asset information from the work order phase, well, you don't the, the, the worker's not going to have to go, oh, and I have to, I have to leave perform work.

4:33
Now I have to go log in to perform asset management.

4:35
Now I got to go search for this asset.

4:37
That's not the way it works right?

4:39
From the work order phase and perform work, the user can simply click the asset and it's going to automatically take them into perform asset management, take them directly to the asset.

4:50
So within one click they get instantly to the data that they need.

4:54
Similarly with inventory, right, I can be on my work order and I may need to order, I may need to pull a a filter from from inventory.

5:01
So similarly I do that straight from the work order, I can automatically access a warehouse and create a pick for the item that I need on my work order.

5:10
So this, what this is allowing you to do, provides your workers in the field easy to easy to use and access to the data they need to get the job done as efficiently as possible.

5:24
So some of you I know are using some of the perform apps, others aren't.

5:29
And so where we see, you know, where we're really trying to target perform is, you know, work order summits that that may be paper driven also mean that PM checklist items are paper driven and inspections are more than likely paper driven and other activities around the work are paper driven.

5:45
So that is a very large impact to the efficiencies you could be gaining.

5:50
You know, the overall, the overall approach for operate in aim is to move you into more automated processes and move you off of these manual efforts.

6:02
So perform just enhances that functionality for your folks in the field.

6:07
So if you're doing paper plot processes, workflows are also impacted, right?

6:11
And now you get, now that's limiting your reporting, the accuracy of the key information and activities that you've taken on.

6:18
And similarly, a disconnected process for material management.

6:21
This is going to leave you with delays and being able to execute your, your work orders, maybe holes in the inventory, the items just aren't there anymore because you can't track when they're in or out and even purchasing processes get impacted.

6:34
So moving off these paper processes, you'll see immediate results on all of your work, work order activities and this digital process management will perform provides real time knowledge of how your organization is operating.

6:52
So before we go into father, I just want to kind of do our our approach to the work overview.

6:58
And it does involve more than just engage, I mean perform and it starts with engaged in our world.

7:04
So engage is that customer facing portal that's the request input mechanism and that comes in to operate, right.

7:11
So operate is that is our IWMS, it's the heavy lifter, it's the it's the core of the product, product line.

7:19
So when a work is submitted, it goes through its triage process, whether there's a workflow on the engage side or it's just coming in to be reviewed and approved on the operate side.

7:28
Once that approval or or rejection occurs, notification will automatically go to the to the can be configured automatically go to the requester.

7:38
If it's approved, then the the the due diligence is done to create the work order and put in a condition to be executed.

7:45
And that's where perform comes in.

7:47
We now put that assign that to our technician and it's on their daily assignments.

7:51
Then in the field off the mobile app, the work can be done.

7:55
Asset management can be done, material requesting and inventory activities can be done as well as your time keeping.

8:01
So they can swipe and keep time right in the field from the mobile app to be have accurate time keeping and then as actions are done, activities are done based on how you configure it.

8:12
Notifications can go back to the requester to keep them abreast of what their request condition is.

8:18
So very powerful functionality all the way across the system with perform being one of the drivers.

8:27
So when we look at talked about online, right, if you're online, you real time direct connection data's there instant access.

8:34
But many of us have those, those assets that are stuck down in a tunnel somewhere with no connection or bad Wi-Fi spots in our buildings or even assets out in the field that you have to go out to.

8:46
So what we do is we have an offline functionality where you can pack up what you need for the day and then head out to the to the to the assets, do those work orders to disconnect in a disconnected manner.

8:59
And then when you get back in a synchronized position, you can sync it and empty out the backpack.

9:05
So essentially pack it up, work it, unpack it when you get back.

9:08
So very, very friendly functionality for that.

9:13
So with that, I Ranger rain.

9:16
We have a survey out here, so I'm sure we'll have that posted in the chat here in a second.

9:22
And really just want to, I'm just curious where you are on a performed journey if you do have it.

9:27
And if you don't have it, keep on listening.

9:34
So you won't be able to make the successful ascent with perform without that right equipment, right?

9:39
So perform is easy to pack with your existing equipment.

9:43
It has streamlined implementation and and very minimal training as needed.

9:49
So it's a very fast spin up product.

9:52
The purpose, it's purpose built design helps keep users perform in perform and in the field as quickly as possible.

9:59
So to to be sure you have some change management though.

10:03
So you know though we'll have those folks that are on paper that don't want to move off paper.

10:07
And to be honest, paper provides them some level of anonymity.

10:12
You know, they can, they can delay things and then maybe not get the right information all because it's paper driven.

10:18
So you are going to have some change management to undergo, but the advantages of the change are almost immediate for process improvement and we've seen at least a 5% efficiency leap for maintenance staff that move off paper processes and into electronic work distribution.

10:37
So let's take a look at the apps in a little more detail.

10:41
So work is one of our most probably the most used app that we have.

10:46
So work, you can assign work and now we have a map view to see where that work assigned work is located.

10:53
We again, we can do the recordings, we can get access shop stock, we can access warehouses, create purchase request.

11:00
Some of the real power in it is being able to take photos and record notes straight from the field.

11:04
And you can also create follow up request, follow up work requests and then partnered with work, I think pretty tightly is asset management.

11:13
I think these are our two, probably our two most used perform apps.

11:18
And so with the asset management app, we can asset, we can manage and edit the basics.

11:23
We can verify the location of the asset, we can add Geo coordinates of where that asset's located, and then that can be leveraged and locate, add new assets from the field, capture the condition information so that those folks that are doing FCAS or FC is out there.

11:40
Those are that you can connect, capture and maintain that data from the Perform app.

11:45
You can do these inspections, which is a very valuable function and then do reading.

11:49
So all of that's electronically done and instantly captured.

11:55
So with that, let's take a live look.

11:56
I'm going to get my screen shared here.

12:02
First want to go to we go to engage.

12:09
So it all starts with a request from Engage, right?

12:12
So I'm going to go engage.

12:13
You've never seen Engage.

12:14
It's the customer request portal, completely configurable images screen everything.

12:19
You want to see all the request tiles completely configurable.

12:22
But in this case, I have somebody put in a temperature call and then Rita put that call in.

12:26
So it created a work order.

12:28
She did receive a notification that, hey, you've put in this work order and it was set to a status of open.

12:34
So she got that notification and then it was set to a status of assigned.

12:38
And that's what we're going to go look at now because it was assigned.

12:44
It was assigned.

12:45
Sign in over here there with this it was assigned to Mr.

12:55
Mike mobile down here, my shop person.

12:57
So I have this work order hot call assigned to Mike.

13:00
So let's go take a look at what Mike has got on his daily assignments all right What's happening here?

13:17
Oh, sorry, wrong thing.

13:22
Many things up, but there we go, the daily assignments.

13:24
So notice though, you see that little tube up there on the 2024 section?

13:28
I'll zoom in here, see that little icon.

13:31
So you'll get a little tickler.

13:32
The user in the field on his mobile app will get a little tickler that there's some activity that's been assigned to him.

13:37
I'll come in here, I'll go to his work queue, and here are the daily assignments that have been assigned.

13:43
So today this is what's been assigned into this individual.

13:46
And if I wanted to see where they are, notice in the upper left hand corner here or upper right hand corner, there's a little map icon.

13:53
That's what's been added to perform work this on this release.

13:57
I click that icon and notice it's taking me to the iOS's map function, the Apple map.

14:02
And you can see different thoughts associated in my, in this particular in my state, Texas here that there's that work needs to be done.

14:09
And of course, you can zoom into it and, and see exactly where it is.

14:13
Notice in this one from a daily assignments perspective, my location is the blue dot.

14:18
So I can then see proximity wise where the work is in relation to where I am.

14:23
So I could quickly determine what I can get to quickly.

14:25
I'm going to zoom back out because I want to go to this work order.

14:30
I just touched it on the screen and it takes me right to it.

14:32
And this is that hot call that Rita put in.

14:35
So from here I can do things like start running my time.

14:39
So I'm going to go ahead and just swipe and start running my time.

14:42
So now my time card is starting to work is is taking time in real time.

14:47
I can change my status from assigned to in progress.

14:50
So now I can quickly manage the process and I and my supervisor, if they're monitoring that work activity, can see that things are moving along.

15:00
I can come down here and, and ask for materials if I need to, so I can get into my warehouse purchase record so we can do a spot purchase, which is, you know, hey, I ran to Home Depot and bought, bought my filter and, and with my P card.

15:12
And now I want to log the fact that I did that.

15:15
So I can, I can log the dollars that I'm spending on this work, on this work order.

15:20
I can notice at the bottom we can add follow up work so I can create another work order out of this.

15:25
I can also look at any contracts that may be associated with it.

15:28
So you're here I'm if I need to contact my contractor, I know who to get to.

15:34
I can look at the work order header itself so I can see the main information about the work order header.

15:38
Notice that my contact Rita has her information there.

15:42
So if I had questions or anything about what the work needed to be done, I could contact her.

15:48
I can also take notes in the field and this is really powerful because if I'm in the field working and I I'm usually not a typer, I'm a wrench Turner, right?

15:57
So if I could go in here, I can add a note.

15:59
I'm going to add it to the phase.

16:03
And because my mobile device has voice to text, I don't I only click 1 button the microphone.

16:09
Hi, I'm on my way to respond to your work order.

16:12
Be there shortly.

16:15
Save that.

16:16
And now I have a note on the phase.

16:17
So it's keeping, I have these valuable notes.

16:19
Now it's also a good feature to have.

16:23
So you can go up to whatever your work, work order phase task is.

16:28
And maybe you're in front of an asset.

16:29
You can have verbal notes taken to just see observationally what you're seeing before you do the work and then take notes afterwards when you're completed the work.

16:39
And with the documents perspective, I can also take pictures.

16:42
So maybe I want to take a before picture, but when I was working and then then after picture when I was working.

16:46
So that gives you a tracking, a visualization and A and A and a verbal or notes information about what's been going on.

16:56
Now back up a little bit here.

17:00
Notice though, I have this, the little time indicator on my work order phase that's telling me visually this is active.

17:06
This is an active project.

17:08
So if for some reason I need to move to another project, that's telling me I need to come in here and change my time setting, come in here and stop my time.

17:20
Now I'm going to jump back over to operate here, going to go refresh the screen and watch, watch the work order phase.

17:32
You see the little note icon that came up?

17:34
That is the note that I just sent out and back on engage side.

17:41
My requester got the back, got the notification that the the phase status changed in progress and they got the note that I'm going to be there shortly.

17:53
Now, all of this is configurable and not everything has to be communicated back, but you can you can configure all of that.

17:59
The advantage here is you're keeping a good line of communication back to the requester, which is sometimes a a good thing.

18:06
All right, you go back to my in share here.

18:17
So another notice of the top left, we have the queue.

18:20
So I'm going to click the queue button.

18:22
What that does is it takes me to screen.

18:24
It shows me all the work that I've had assigned to me that I haven't got to yet.

18:28
So these are all work that I've had assigned as daily assignments on days, weeks past.

18:33
Now it's just sitting in this overall queue.

18:35
And then notice on the top right again, we have the map.

18:38
So I can click that map and it's going to tell me where all that work is happening.

18:41
So I got a whole lot of work up in the Gatesville area in Texas here.

18:46
I want to zoom in kind of in my area.

18:48
Notice it's a four right now.

18:50
Well, it just split to it split.

18:52
You know, I zoom in a little closer, it's split again.

18:56
So what it's doing is giving you a visualization of all the work that may be occurring in one area.

19:00
But you can get zoom in, zoom in and get to the detail of that and then just click one of those icons and boom, you get to the detailed data.

19:07
Now I'm going to come in here and look at a particular.

19:16
I'm going to come in here and look at one of ones I had in in my queue.

19:22
So here I just jumped into one and this one is APM checklist.

19:25
And digitally I have my PM checkpoints right here.

19:28
So I can come in here, execute my PM checkpoints that get all tracked to the PM record and I can see my asset right there in the middle and notice the little I off to the right.

19:37
If I click the I that took me straight into perform asset management straight to the asset.

19:44
So now I can see is there any inspections that need to be done?

19:47
What parts do I need for?

19:48
Do I need to do an assessment?

19:50
And with my assessment data, I get to that condition information that we have.

19:55
I can also get to information directly about the asset.

19:58
So now I can come in here and maybe add, edit the attributes that are associated that asset by an asset by your asset group.

20:05
And again, take notes.

20:06
And then and if there's any documents associated with it, I have access to the documents right there in the field from my mobile device.

20:12
So if we have procedures and manuals, that kind of thing, I have that data right there at my fingertips.

20:19
And then note on the upper left.

20:21
Very tiny right here.

20:25
You see work a work back button so I can get go over here, click the work and I'm back to my work order.

20:31
So easily jump between the different products to be able to get to the information that I need.

20:36
All right, let's keep moving along.

20:46
So inventory you can draw, you can draw a bit, you make the pick list, you draw them, you can release them and if they get too many were released, you can get the the return parts back.

20:58
You can take physical counts.

21:00
It can also do manage the parts within the within the different warehouses with material received.

21:07
That's the purchasing functionality, the spot purchasing functionality and then you can do approval.

21:12
So, so you can approve purchase requests that you that have come to you for that if that's your role.

21:20
And then on the receive side, that's you do that same thing for you.

21:23
You can receive the purchase items from the vendor.

21:25
You can capture packing slip information.

21:27
You can accept or reject the receipt.

21:30
You can partial accept, you get receiver's signature on it.

21:34
You can also disperse these to work orders to and you can contract to who it went to and then you can take back those extra materials from the work order that are needed, which was the reverse dispersal.

21:44
And then we have capital improvement functionality.

21:49
And I'll jump over real quick to back to the share that just to take a quick look at that capital.

21:59
So here we're seeing in this case as this user, I see these projects that are associated to me.

22:05
Well, I'm going to click into 1003 here and right away I can see I have some issues to deal with.

22:10
There's some inspections I don't need to be done.

22:13
I don't have any workflow items associated to me at this time.

22:15
But I do see that I have some assets associated to this this capital project.

22:21
So that means maybe I brought assets on as a purchase as part of the purchasing process on my project.

22:27
If I click the little I indicator next to the project, I start to get to the project details.

22:31
Here I can see kind of activity status.

22:33
I can see my teams.

22:35
So if I need to contact somebody, I can do that right for my device.

22:38
So if I'm not actually on a iPhone doing this, I could call my architect right here from in the field again, notes and documents.

22:47
Then across the bottom here, I could generate an inspection.

22:50
We can also generate issues against it and then all the mobile apps have functionality to launch into the full operate system.

22:58
So in my case, I'm on an iPad mini.

23:01
So if I did that, it probably wouldn't be too bad.

23:03
It'd be a little small screen, but I could actually do actions within the main product right here from my my device.

23:15
And I think with that, Brandon, we have one last survey.

23:22
It's really saying, hey, do you think perform fits for you?