

CARL Source 7.7

CARL Touch User Guide



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1. PURPOSE

This document describes how to use CARL Touch, the mobility option of CARL Source.

CARL Touch should have been installed previously in accordance with the CARL Touch Installation Manual.

2. PREREQUISITES

The hardware must comply with CARL Berger-Levrault's hardware recommendations.

- **CARL Source** Version 7.7.0
- **CARL Admin** Version 5.5
- **Smartphones and Tablets** on Android™ 10 or higher or iOS 13 or higher
- **Have access to the Play Store and/or the App Store** to download the version and updates.

3. RECOMMENDATIONS

3.1. Date and time on the mobile device

Time stamping of actions taken in CARL Touch is of the utmost importance for the correct operation of the application. Accordingly, to ensure that the date and time are set properly on smartphones and tablets, and to avoid the need to make adjustments for changes of time zone or summer/winter time, we recommend setting the date and time to automatic mode.

3.2. Management of technical attributes

The standard processes of CARL Touch are partly based on technical attributes stored in the database and not displayed by default in the forms of the CARL Touch or CARL Source applications. To ensure the proper functioning of the application, any modification, regardless of its form or method, is strictly discouraged.

4. ACCESSING CARL TOUCH

4.1. Introduction

If the CARL Touch version installed on your mobile device is not a version 7.1.0 or higher, you must **uninstall** and then **download** the version 7.1 available on the App Store or Play Store as indicated in the paragraphs [iOS installation](#) and [Android™ installation](#).

You will also need to check the mobile devices registered in the CARL Touch Administration feature and remove obsolete versions. For this purpose, please follow this procedure:

From the CARL Touch Administration feature:

- Select all records for which the version is different from 7.1.0 or higher,
- Select the "Canceled" status from the status workflow button ,
- Confirm the change of status,
- Remove all records in the "Canceled" state.

4.2. iOS installation

To download CARL Touch iOS from their mobile device, users can go to the App Store and search for the CARL Touch app, or scan the QR Code below.



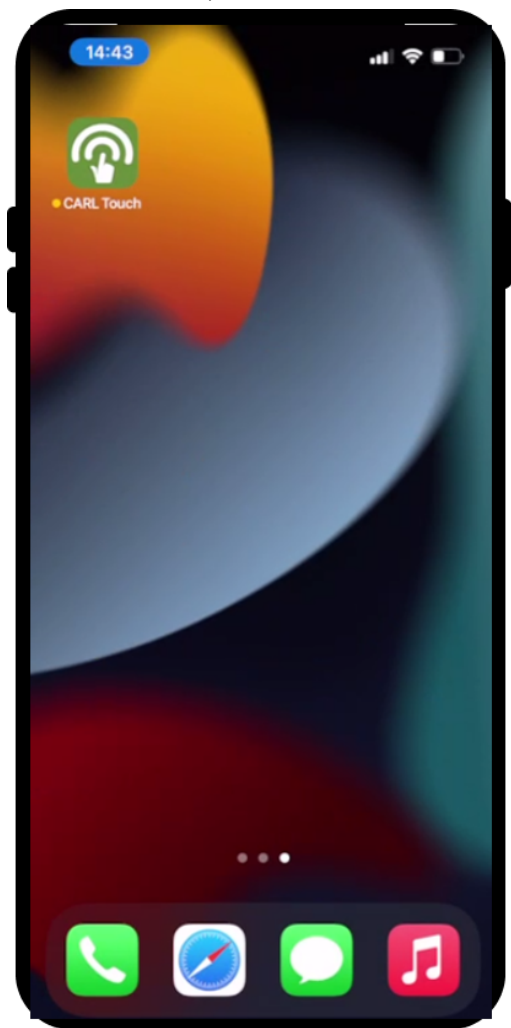
4.3. Android™ installation

To download CARL Touch Android™ from their mobile device, users can go to Google Play and search for the CARL Touch app, or scan the QR Code below.



4.4. Running the application

To start CARL Touch, select the «CARL Touch» icon from the list of applications on your mobile device (smartphone, tablet).



4.5. Configuration

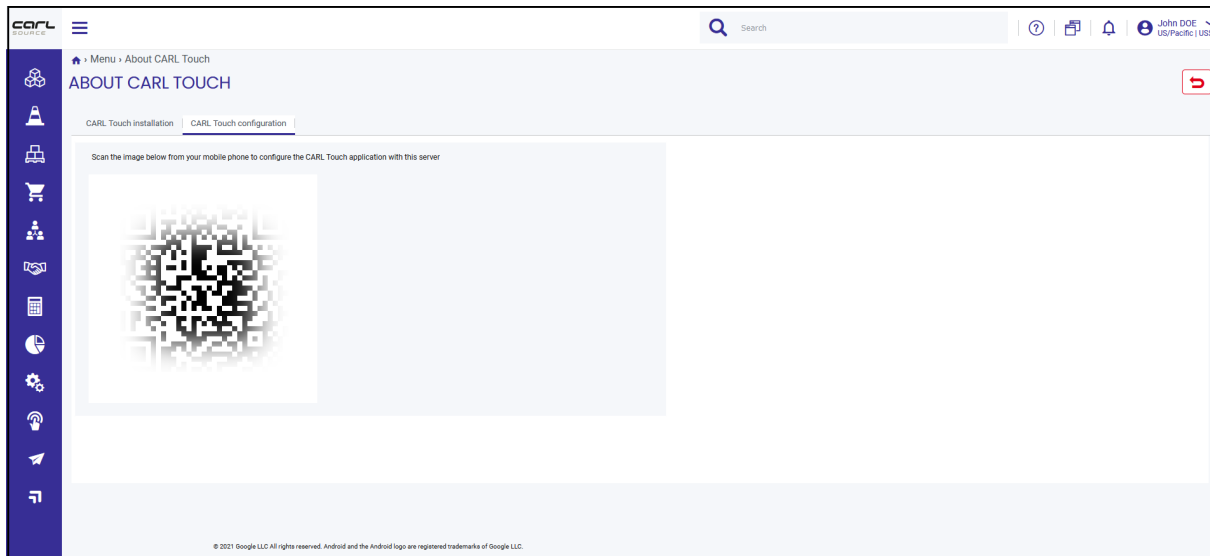
Once you have installed CARL Touch on your smartphone, you are asked to scan the configuration. The screen below will be displayed, enabling you to scan the configuration QR Code by selecting the "Scan configuration" button.



The configuration QR Code is located on the «About CARL Touch» form in CARL Source.

The screenshot shows the CARL Source dashboard with the following elements:

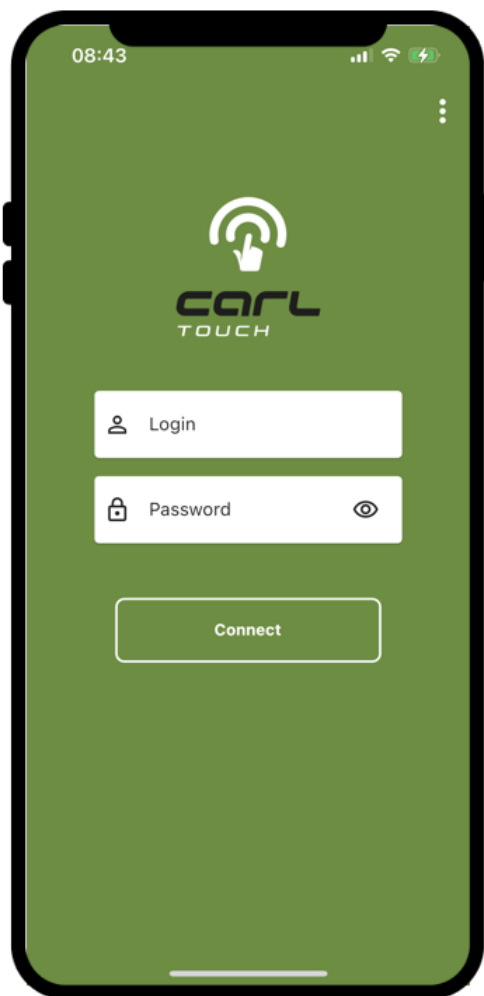
- Header:** CARL SOURCE logo, search bar, and user profile (John DOE, Europe/Paris, 10:55).
- Left Sidebar:** Navigation icons for various functions.
- Main Content Area:**
 - Tableau de bord P99:** Includes a map of France, a bar chart for 'Assets out of order', and a gauge for 'Work orders in progress' showing 37.
 - Search Bar:** Located at the top right of the main content area.
 - Dropdown Menu:** Opened from the 'Inter' icon, showing options: 'Help on line', 'About CARL Source', 'Access to terms of service', 'About CARL Touch' (highlighted), 'About CARL Xpress', and 'About CARL Flash'.
 - Widgets:**
 - Recherche des modèles, articles, demandes d'achats, commandes, interventions, DI:** A vertical list of search buttons.
 - DA à prendre en compte:** 0.
 - Matériel en maintenance:** 0.
 - Commande en retard:** 1.
 - Assets under work order:** 4.
 - Assets under warranty:** 0.
 - WR to take into account:** 13.
 - My WR to take into account:** 0.
 - Work orders in progress:** 37.
 - Work orders late:** 36.
 - Items awaiting delivery:** 1.
 - Footer:** 'Simplifiez la gestion des' and 'LOGICIELS ET SOLUTIONS'.



4.6. Authentication

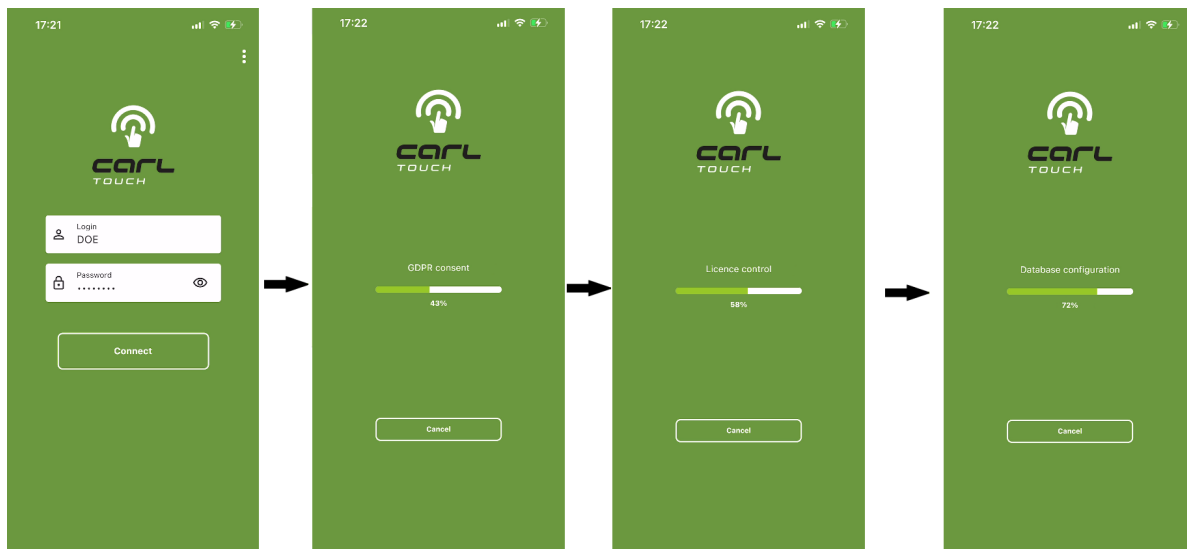
Once configuration is complete, CARL Touch displays the authentication form. This form enables users to enter:

- Their username in the **Identifier** field.
- Their password in the **Password** field.



Users must confirm their authentication by selecting the "Login" button.

CARL Touch checks the user's authentication with CARL Source and then loads the CARL Touch data.



CARL Touch then displays the first function accessible from the menu.

If CARL Source is configured for SSO authentication in the authentication system settings, a  button is used to switch to your organization's SSO portal.

After entering and confirming their user name and password, users are returned to CARL Touch and synchronization with the database is initiated.

If CARL Source is configured for mixed authentication in the authentication system settings, users can choose to log into CARL Touch:

- either with their CARL Source user name and password
- or with their SSO user name and password

A "SSO Login" button is added to the login page and allows them to switch to their organization's SSO portal.



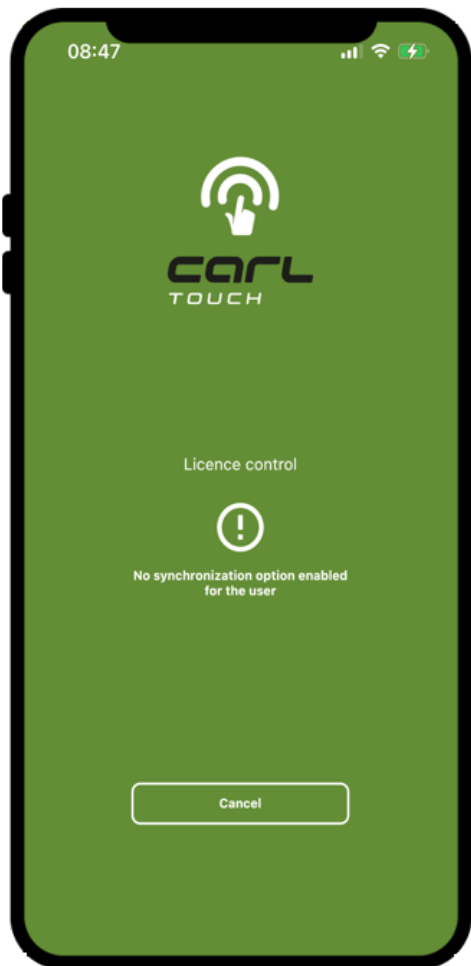
4.7. License checks

CARL Touch checks the licenses for each module. To determine whether user authentication is authorized, CARL Touch checks license availability depending on the synchronized modules deduced from the user's profile.

- **Work** module:
 - Synchronization of tasks: Work requests and/or Work orders
 - Synchronization of equipment: Locations and/or Main points and/or Assets and/or Templates
- **"Stock/Purchasing"** module:
 - Synchronization of items
 - Synchronization of receipts

If the number of licenses per module has been reached, when a new synchronization request is made CARL Touch will display one of the following messages depending on the user's profile:

- No license available - The number of work licenses has been exceeded (For an Equipment/Work profile)
- No license available - The number of stock licenses has been exceeded (For a Stock profile)
- No license available - The number of licenses has been exceeded (For a full profile)



4.8. Reconnection if authentication has expired

The system setting «Authentication token validity time» can be used to set how long a session may last before it expires.

When a session expires:

- Exchanges between CARL Touch and CARL Source are halted.

- The user is automatically disconnected.
- A popup is displayed, asking the user to authenticate. The **password** must be entered.

Session expired

Your session on the server has expired; please log in:

Password

Connection

If not, the pane at the top of the main lists indicates «Session expired». Pull down the main list to display the authentication popup again.

The [Knowledge Sheet \(FDC\) 006072](#) contains information to help diagnose certain errors.



This is not an exhaustive list of errors that can be returned.

5. ERGONOMICS

5.1. Action bar

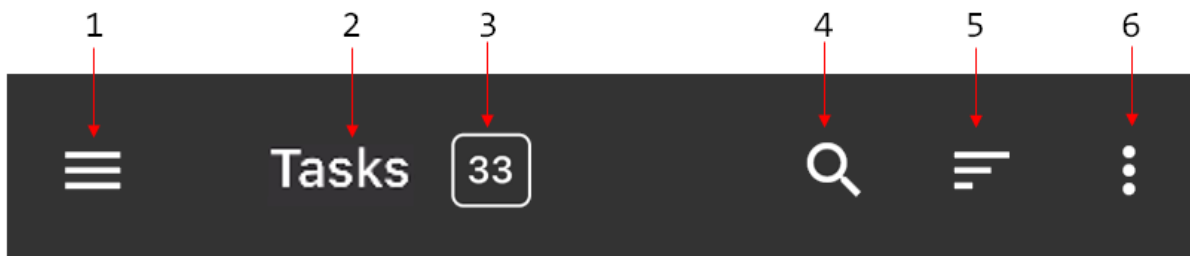
An action bar is shown at the top of each CARL Touch form.

Depending on the context, this action bar enables the user to:

- Identify the current form.
- See how many elements are displayed on the current form (e.g. number of tasks displayed in the «Tasks» list).
- Perform actions on the current form (e.g. add records, search, geolocation).
- Navigate between functions (see «Navigation menu» below).

5.1.1. Action bar contents

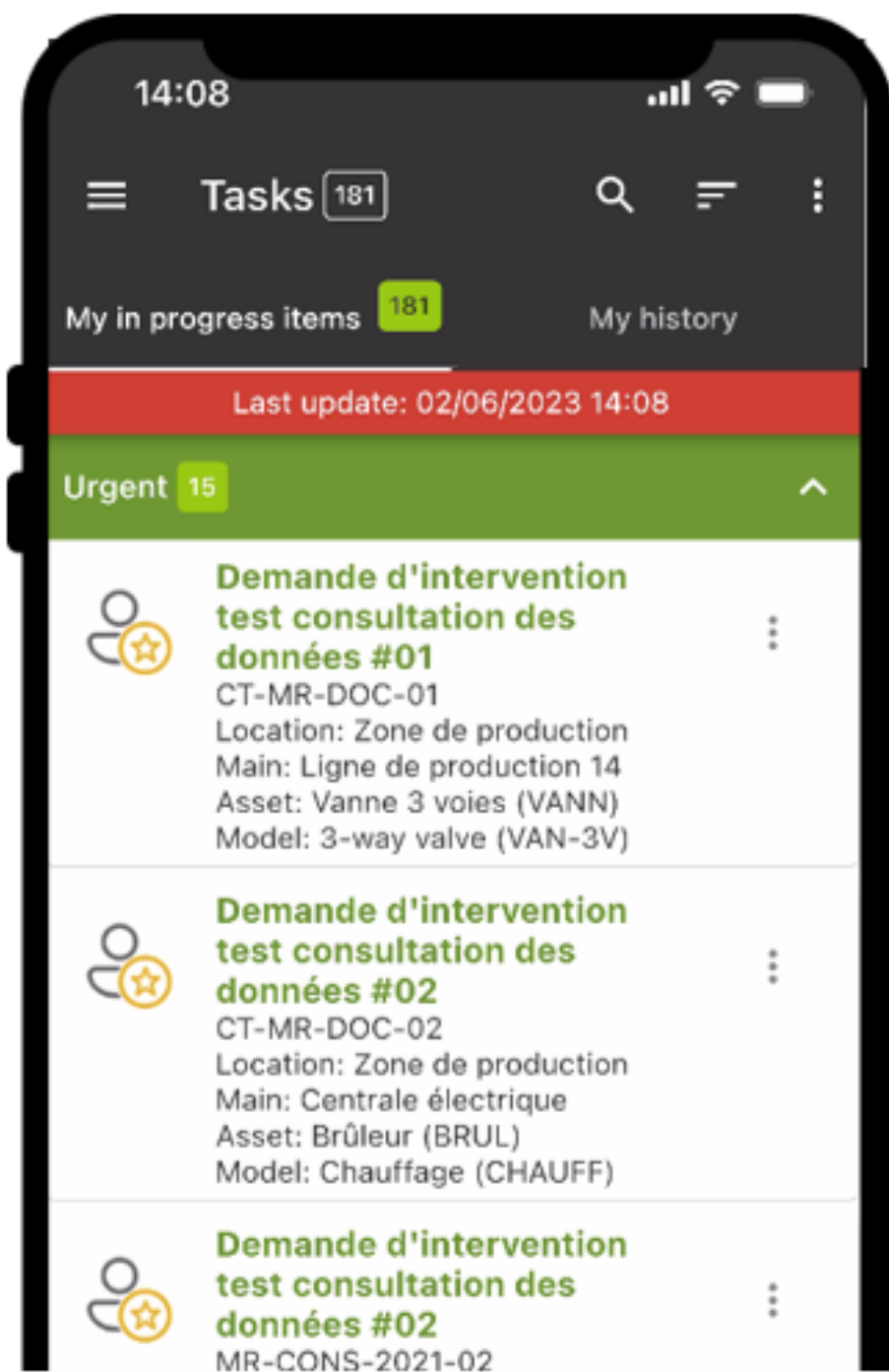
For the main functions, the action bar is displayed as follows:



1. Access to the CARL Touch **application menu**.
2. **Title** of the current form (here, the tasks list).
3. **Number of lines of results** for the current function.
4. Button for accessing the **search box**.
5. **Collapse/Expand** button.
6. Button for accessing the **actions menu**.

5.1.2. Indicator: «Online mode»/«Offline mode»

If CARL Touch does not have a network connection (3G/4G, WiFi), a line is displayed just below the action bar to inform the user of the date and time of the last update with the CARL Source server:



This line is hidden once CARL Touch has a network connection again and has synchronized with the CARL Source server. This mechanism tells users at all times whether or not their CARL Touch device is able to communicate with the server.

5.2. Navigation menu

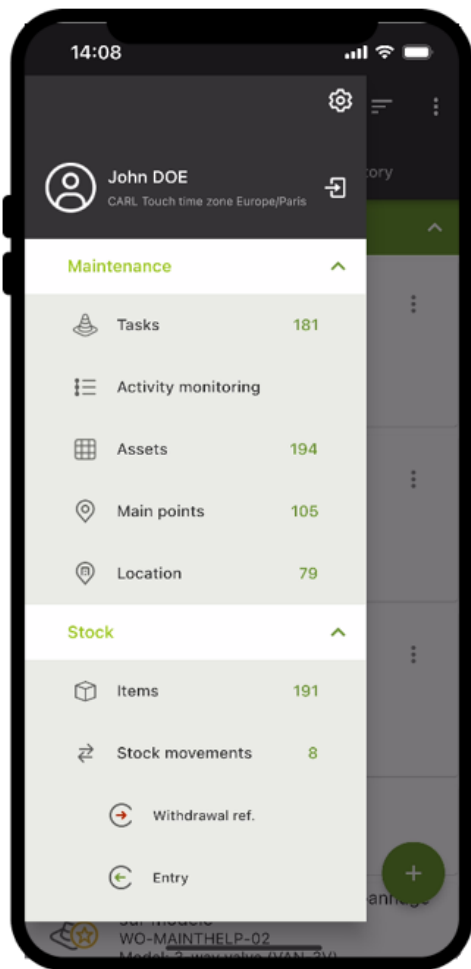
5.2.1. Principle

The navigation menu enables the user to change from one function to another.

The navigation menu is called up by selecting the following button in the action bar:

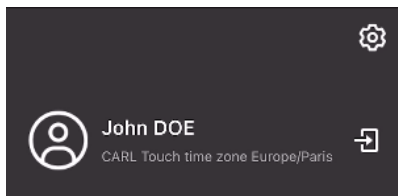


When this button is pressed, the various functions to which the user can switch are displayed:

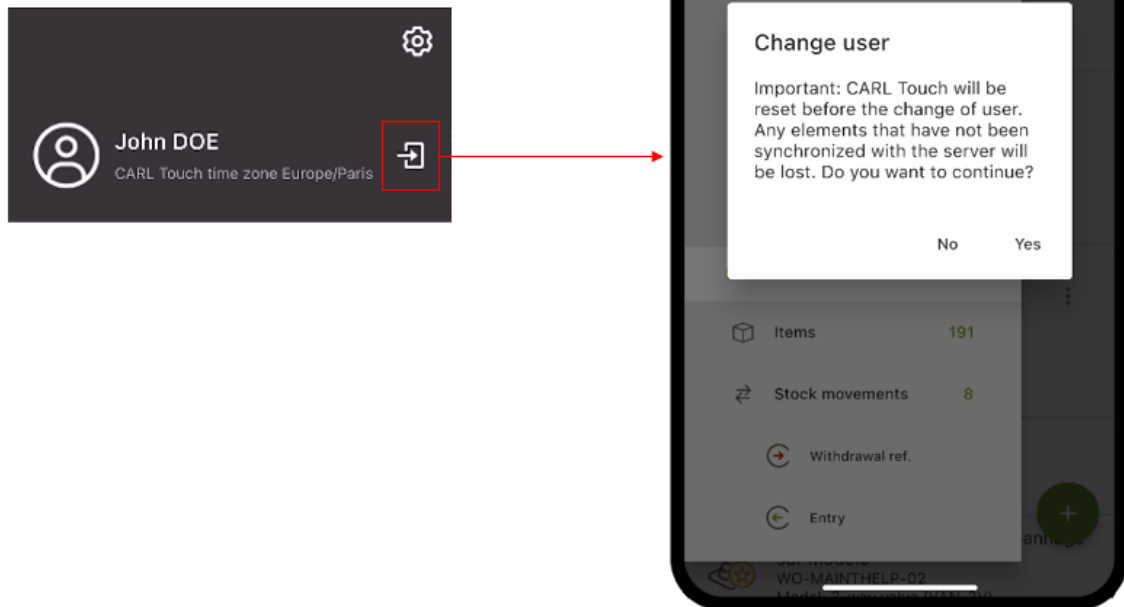


5.2.2. Connected user

The CARL Touch menu always displays the name of the connected user in the first line of the menu.



The icon below allows you to change user. This action requires confirmation, as it entails reloading the CARL Touch database for the new user.



5.3. Settings menu

The settings menu is used to access all the settings information of CARL Touch.

5.4. Functions menu

The menu is structured in three levels:

- > **Level 1:** Modules (e.g. *Stock*).
- > **Level 2:** Functions (e.g. *Stock movements*).
- > **Level 3:** Sub-functions (e.g. *Withdrawal*).

Certain level «3» elements are different in that they do not lead to functions but rather to **wizards** that provide users with step-by-step guidance in an operation (e.g. performing a stock entry).



Wizards are described in detail in section [Wizards](#)

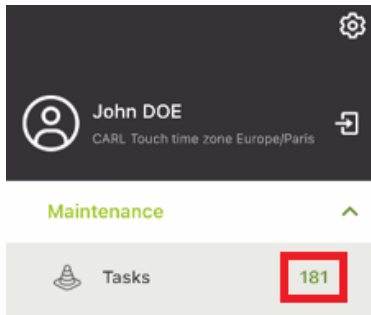
The composition of the navigation menu is **dynamic** and reflects the configuration set in the **user profile**: for instance, a person working only in *Maintenance* will never see functions relating to *Stock*, as these would serve no purpose.

Likewise, with careful use of **profile rights**, it is possible to configure the menu **down to specific sub-functions**.

A user who has chosen to synchronise data relating to stock will not necessarily have access to all stock sub-functions: if this user does **not have access rights to withdrawals** in CARL Source, **the user will not have access** to the *Withdrawals* sub-function in CARL Touch.

The composition of the navigation menu therefore **reflects the profile rights set in CARL Source** for the current user.

The navigation menu also directly shows the number of existing records for the main functions: number of current tasks, number of assets, number of location points, etc.



5.5. Actions menu

The actions menu  is used to access actions available for the current function or sub-function, as well the CARL Touch diagnostic. The menu comprises:

- Actions for which there is insufficient space to display the icons directly in the action bar.
- an "Help" action providing access to the CARL Touch user guide.
- a "Diagnostic" action allowing the saving of information for diagnosing problems.

5.6. Button actions

Certain buttons are used throughout CARL Touch and can therefore be found on various forms in the application.

Button	Button action
	Confirm or save data entered.
	Cancel data entered.
	Select «Edit» mode for a form.
	Delete a field on a form.
	Edit a comment.
	Sort records.
	Search records.
	Collapse or Expand grouping blocks.

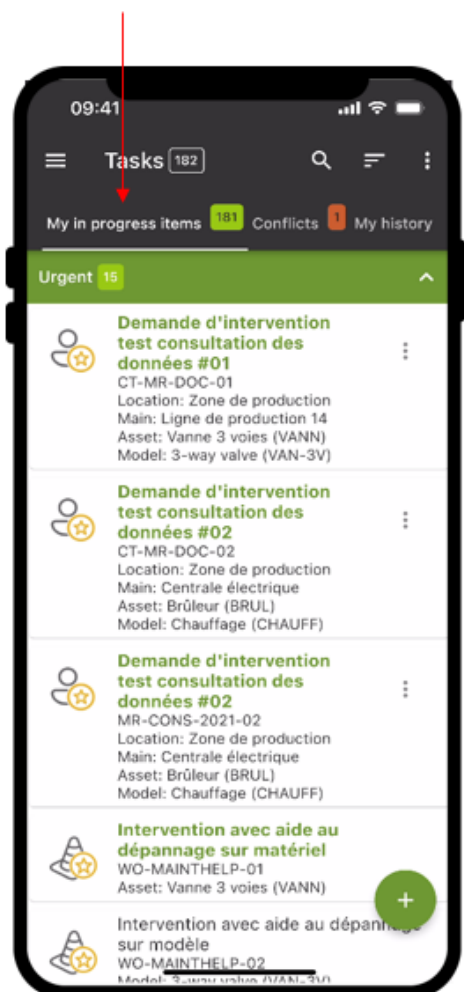
Button	Button action
	On a list element (e.g. a task on the task list), this button displays the list of context-sensitive actions available.
	Scan a barcode, QR Code or Data Matrix.
	
Scan using the RFID reader paired with the device.	
Ability to scan using the device's physical laser scanner.	

5.7. Tabs

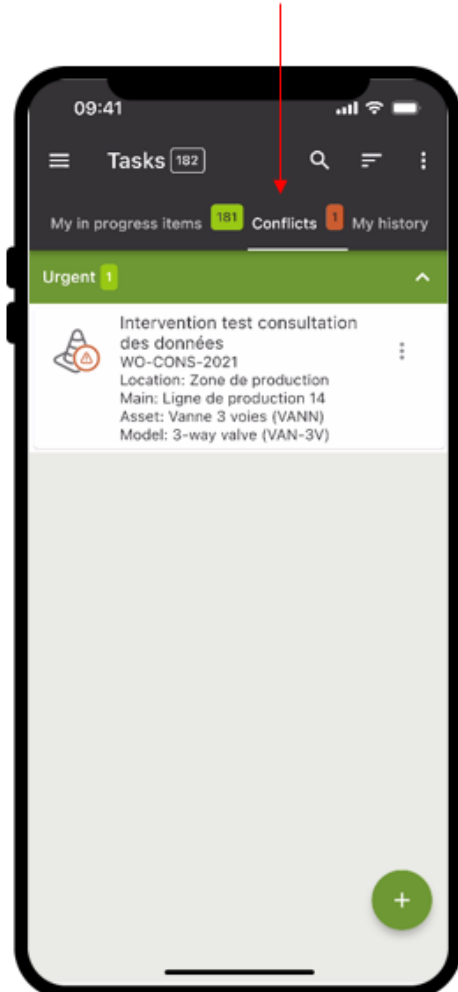
Depending on the context, a CARL Touch form can show information on tabs. If several tabs are displayed, the active tab is identified by a discreet underlining effect.

Each tab, regardless of whether or not it is active, always shows the number of result lines that it contains.

“My In progress items” tab is active (underlined)



Activating the “Conflicts” tab and viewing the results

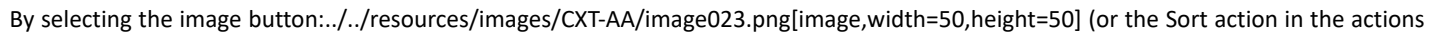


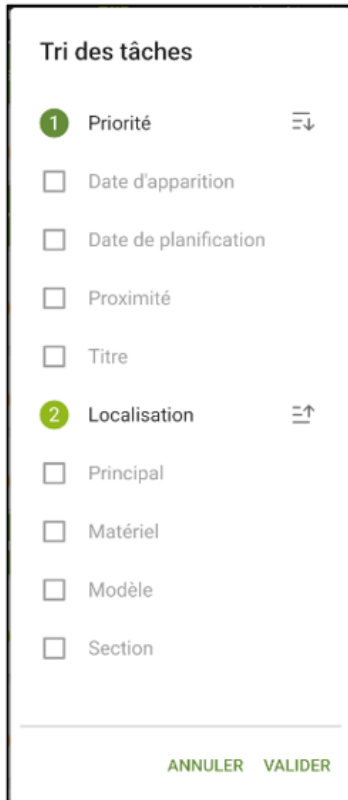
5.8. Sort criteria and grouping blocks

5.8.1. Applying a sort criterion and grouping results

As the list of results can potentially contain thousands of lines, it is important for the user to be able to easily organise the data by grouping according to a selected sort criterion.

The sorting and grouping feature is built into CARL Touch and implemented as follows.

By selecting the image button:  (or the Sort action in the actions menu), the user can modify the primary and secondary sort criteria to be applied to the current results list—here is an example with the sort criteria applicable to the task list:



Tri des tâches

1 **Priorité** 

☐ Date d'apparition

☐ Date de planification

☐ Proximité

☐ Titre

2 **Localisation** 

☐ Principal

☐ Matériel

☐ Modèle

☐ Section

ANNULER VALIDER

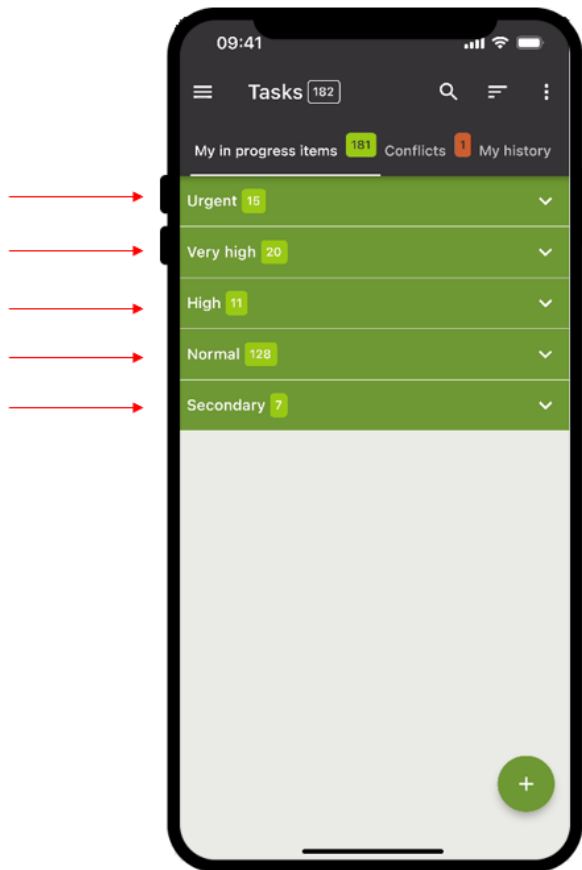


The  button is used to define whether the sorting is ascending or descending.

The sort criteria proposed are the main sort criteria listed in CARL Source settings, as well as all the fields displayed in the list.

The selected sort criterion is applied to the current list, and the results are grouped in blocks: each grouping block displays both the **title** of the grouping criterion and a **counter** indicating the number of records in the block.

In the example below, tasks are grouped in blocks corresponding to the possible «Priorities» for a task – «Urgent», «Very high», «High», «Normal» or «Secondary»:



5.8.2. Collapse/Expand

5.8.2.1. All blocks

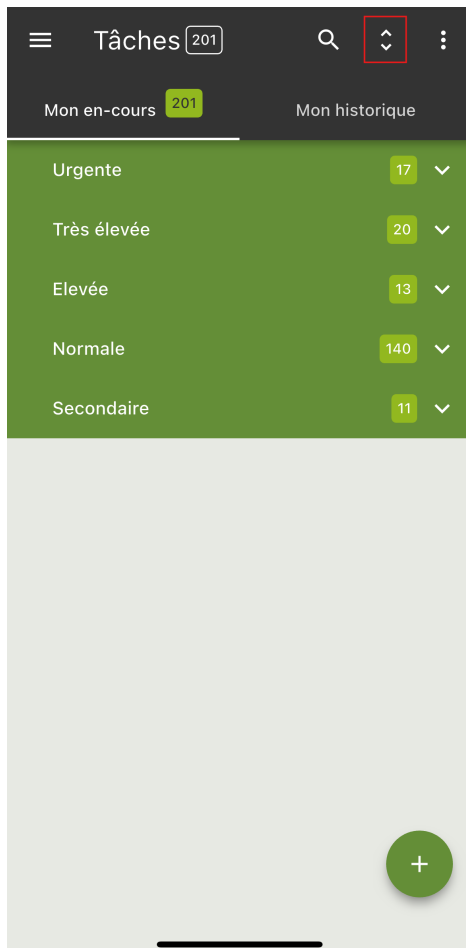
All grouping blocks in a list can be collapsed or expanded simultaneously, allowing the User to choose whether to display the associated data.

The blocks can be collapsed by simply tapping the icon:





Blocks can be expanded by tapping the icon:



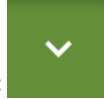
5.8.2.2. A grouping block

Each group block can be collapsed or expanded individually, allowing the User to choose whether to display the associated data.

A block can be collapsed by simply tapping its icon:



A block can be expanded by tapping its icon:

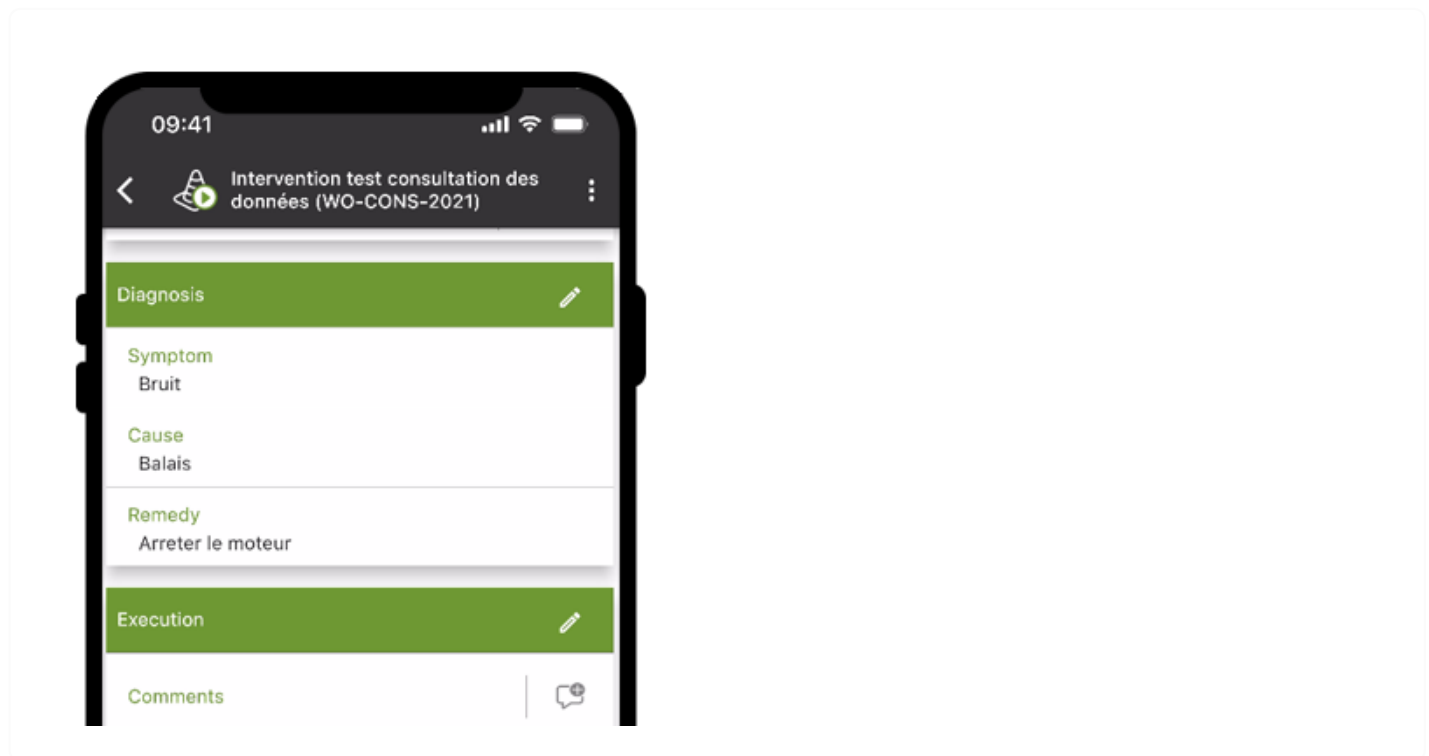


5.9. Detail blocks

5.9.1. Principle

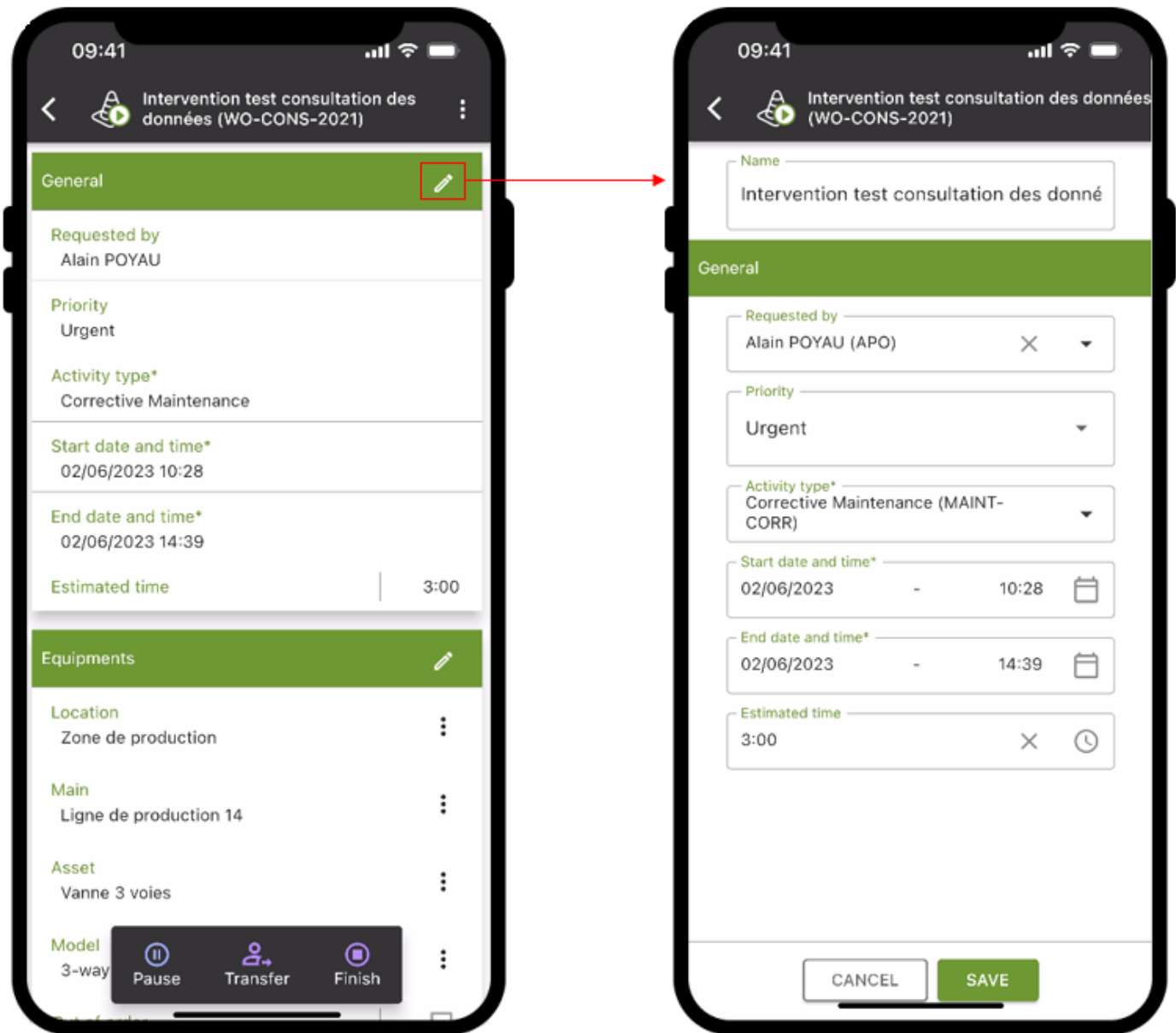
On detail forms (e.g. task detail form), CARL Touch shows data grouped by topic. These groupings are represented by «detail blocks».

Example: "Diagnosis" and "Run" detail blocks



5.9.2. Changing the data in a detail block

To change data in a detail block, press the  button.



5.10. Summary blocks

Summary blocks display messages and dynamic information for users: They can be recognized by their clickable  icon, which leads to a summary screen.

Example: List of operations of a Task

1. The user is on the detail form for a task: The «Operations» summary block indicates that « **0 operation(s) performed(s) out of 2.**»

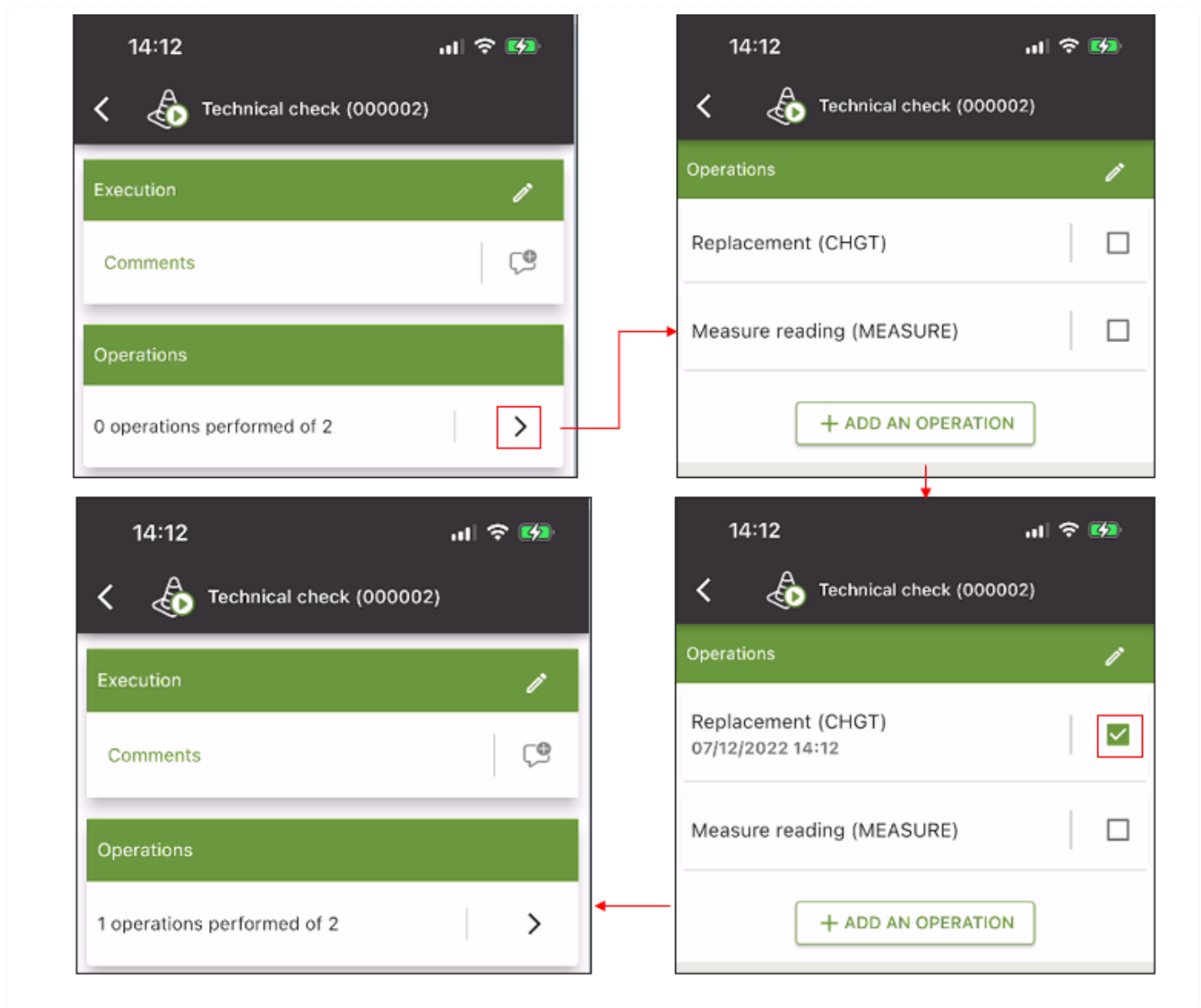
The user then clicks on the  icon at the right of the summary block.

2. The operations summary screen is then displayed.

The user can see that neither of the two operations displayed has been completed so far, and clicks on the  icon of one of the tasks to indicate that it has been done.

3. The task now has a check mark ( icon).

4. On returning to the task detail form, the message in the summary block has been updated and now states that « **1 out of 2 operations has been performed.**»



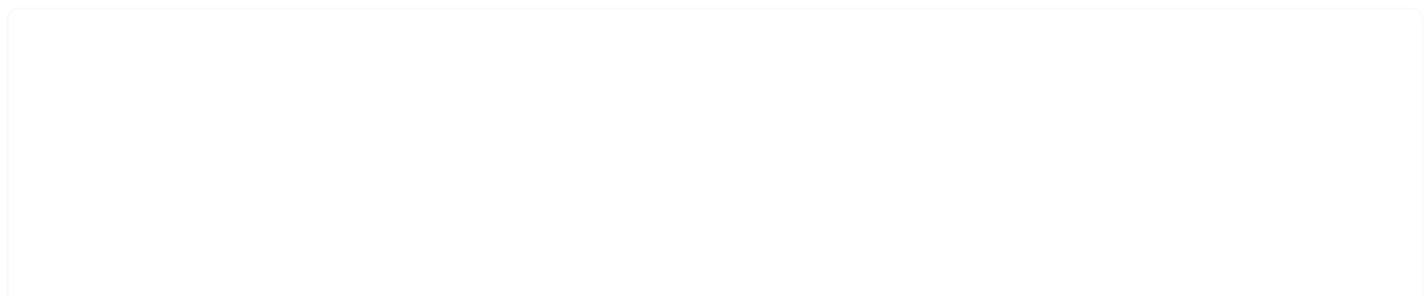
5.11. Custom forms

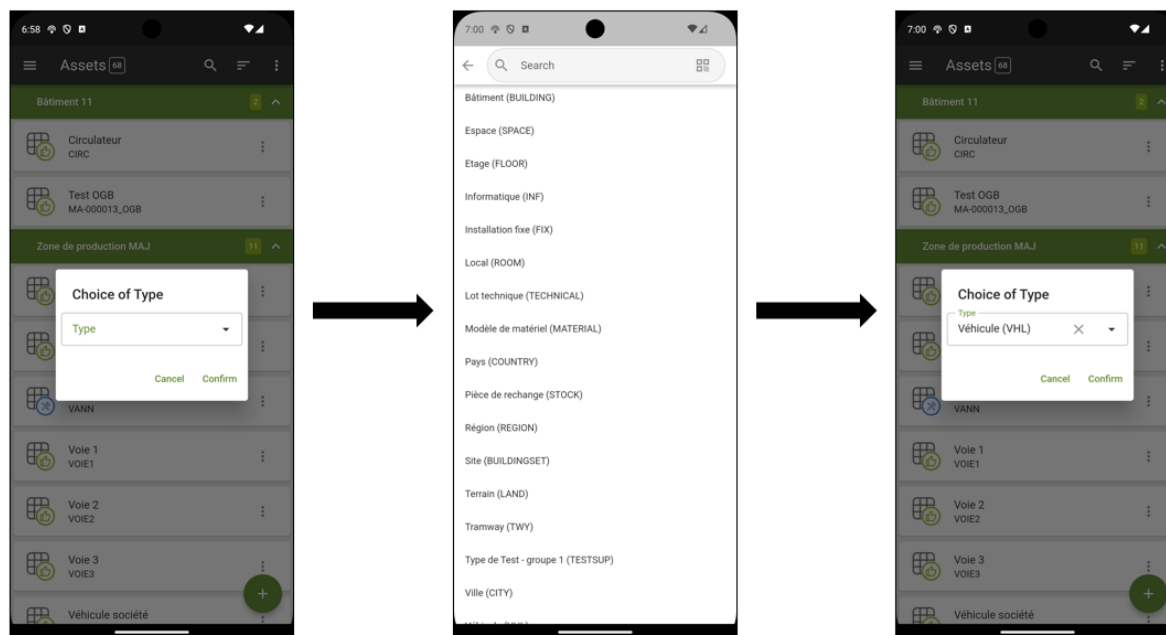
CARL Touch forms can be customized down to the value of the customization attribute defined in the dictionary for the object concerned. This value is set in CARL Source. Conditional customization in CARL Touch forms can be applied to Info zone and list of value attributes. This customization is available for work order, asset, location, item and prepared inventory entities, as well as for operations in a slightly different way.

5.11.1. Behaviour when an object is created

When creating an object for which a number of possible custom forms exist depending on the various values of the customization attribute, a popup is displayed on the screen to enable the user to select the value of the attribute. Depending on the value selected, the corresponding form customization is applied.

Example: Creation of an asset, for which the detail form is customized according to the selected equipment type





5.11.2. Custom forms for operations

For operation details, the attribute that determines the custom form is the operation code. If a custom form exists for a given operation code value, this form is displayed. The behaviour is similar to that described above.

A number of custom forms are delivered as standard (but not enabled) for reading, diagnostics and standard operations.

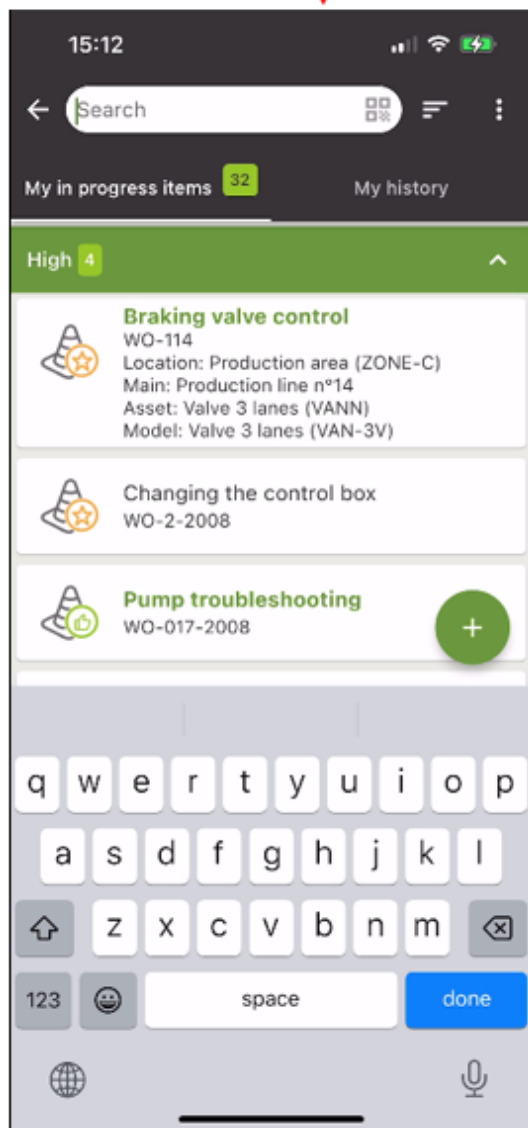
5.12. Searching within a results list

Searching within a results list can be enabled using the following button:



When searching is enabled, a search field is displayed in place of the action bar:

Enabling research shows a **search box**: the input cursor is automatically positioned in the area to allow immediate entry.

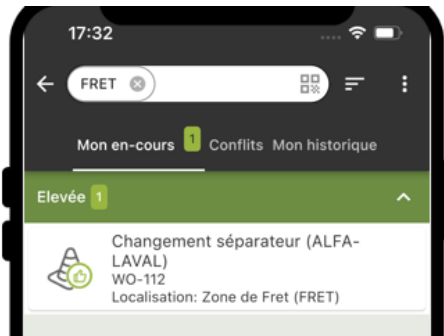


By selecting this icon, you can scan a **QR code** exists rather than having to manually enter the same code.

Enabling research is accompanied by the appearance of the **virtual keyboard** for manual input of the desired criterion.

The virtual keyboard is displayed, enabling the user to enter a criterion in the search field: **once the third character** has been entered, CARL Touch adapts the results list to show only those matching the characters entered.

As an alternative to manual entry, the QR code button enables the mobile terminal's camera to be used to scan an existing QR code and return its value in a "chip":



After manual entry, the search is performed in full-text on the list: it covers all alphanumeric attributes present in the list.

By scanning a QR Code, the search is carried out with an **exact match**: it covers all CODE attributes (and QR Code for equipment).



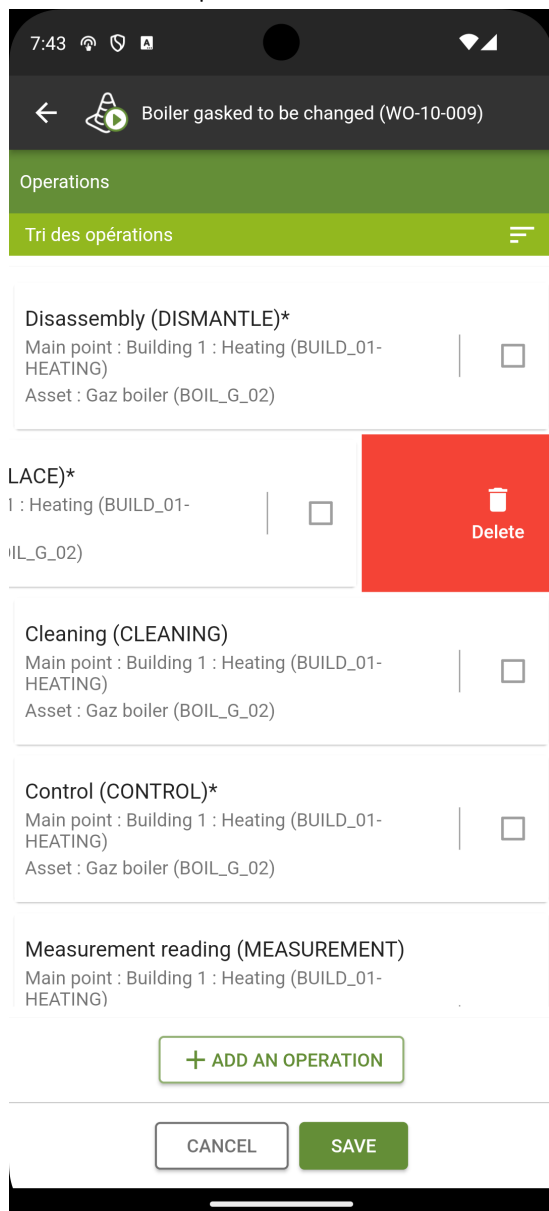
Activating the search on a tab:

In "search" mode, tabs disappear: the search implicitly applies to the results list on the tab that was active when the search was started with the «Magnifying glass» icon.

5.13. Searching within a results list

Deletions in a results list (Operations, Labor types) can be carried out in edit mode by sliding the line to the left, making the delete button appears.

The user can then press the button to delete the data.



5.14. Updating of data

Data in CARL Touch is updated in **real time** («Push» mode).

This real-time update can, if required, be disabled via certain profile settings, requiring the user to manually update by simply dragging down the screen.

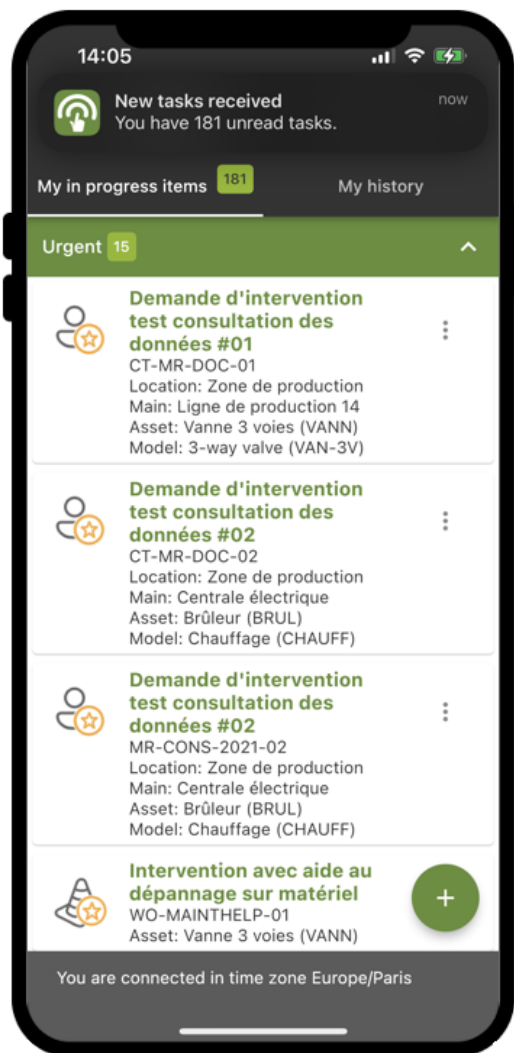


5.15. Time zones

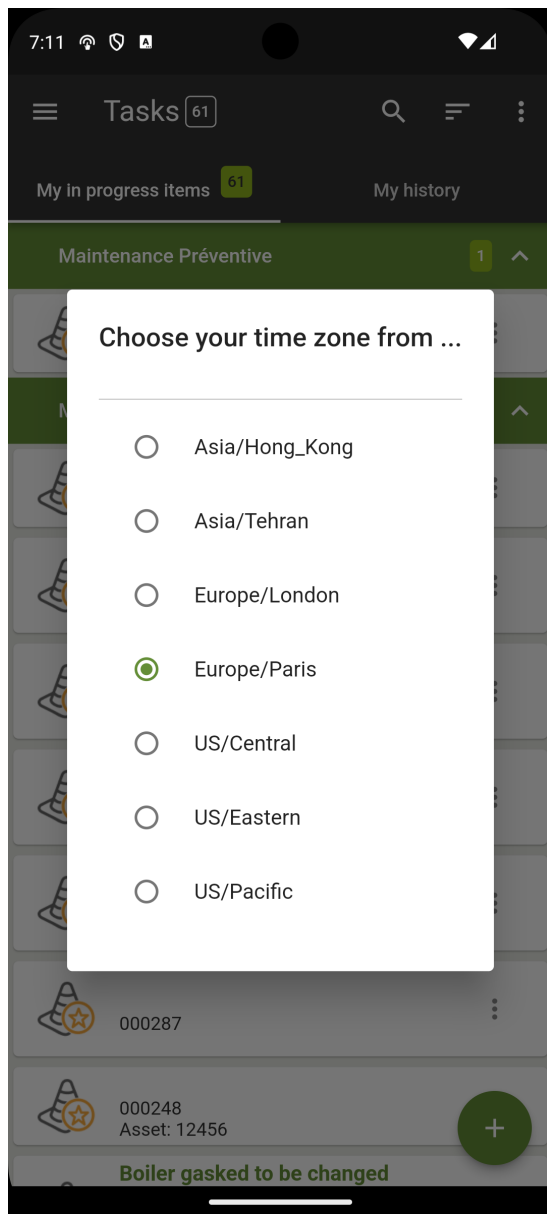
CARL Touch can be used in an international environment, with users in different countries spanning multiple time zones.

When CARL Touch starts up, as default the user is associated with the terminal's time zone. Two possibilities arise:

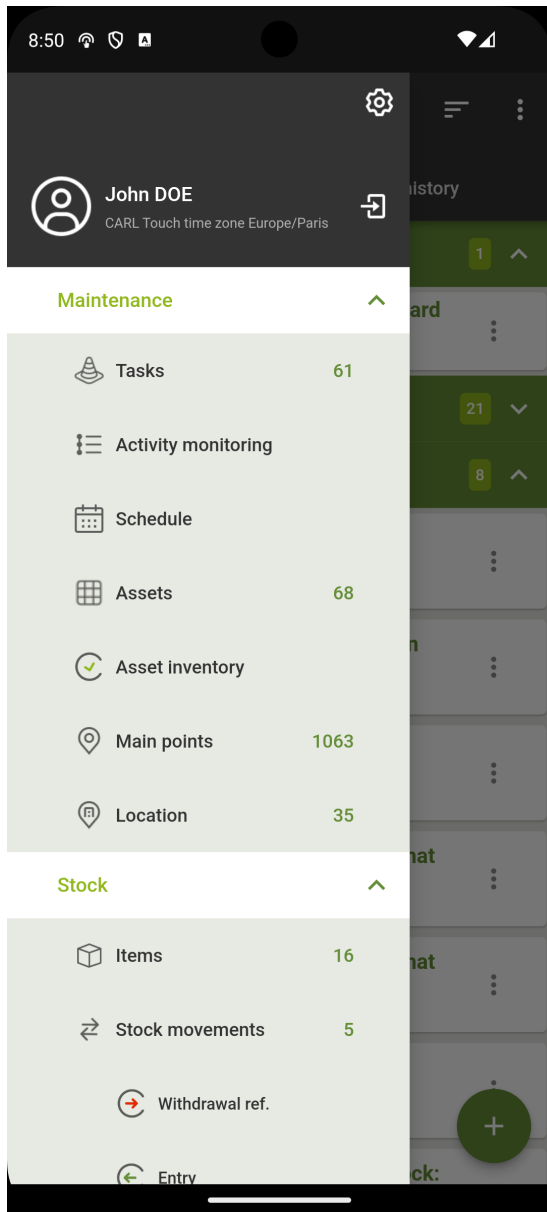
- The terminal's time zone is "known". This means that it is one of the time zones declared in CARL Source that can be used in CARL Touch. In this case, a message appears stating the time zone in which the user is connected:



- The terminal's time zone is not "known". It is not one of the time zones declared in CARL Source and therefore cannot be used in CARL Touch. A dialogue box is therefore displayed, asking the user to select one of the «known» time zones:



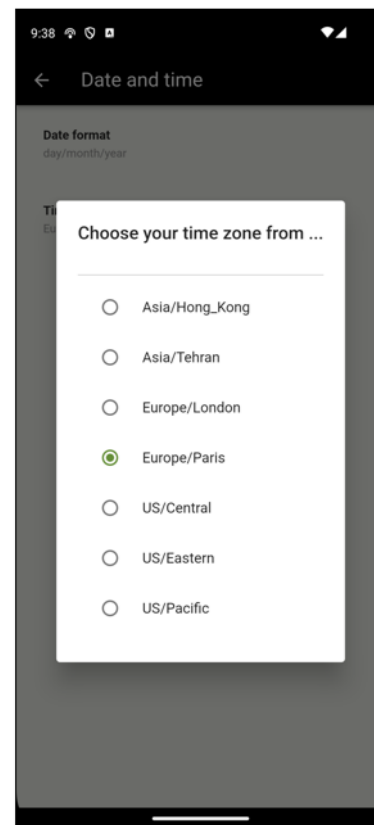
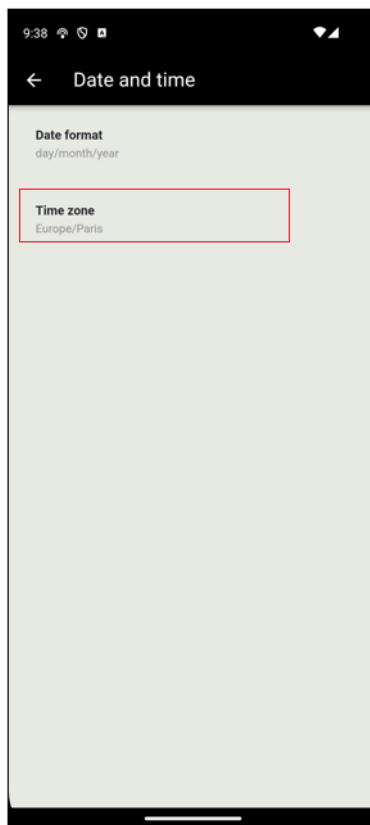
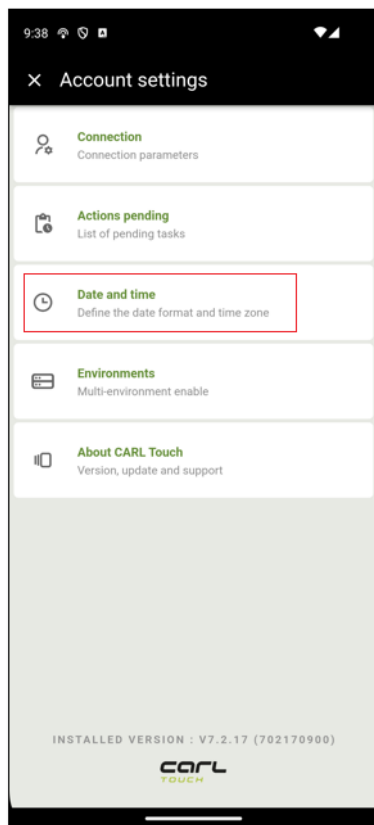
A reminder of the time zone used in CARL Touch is shown in the application menu:



Also, if the terminal's time zone changes, either manually or automatically, CARL Touch detects the new time zone and displays:

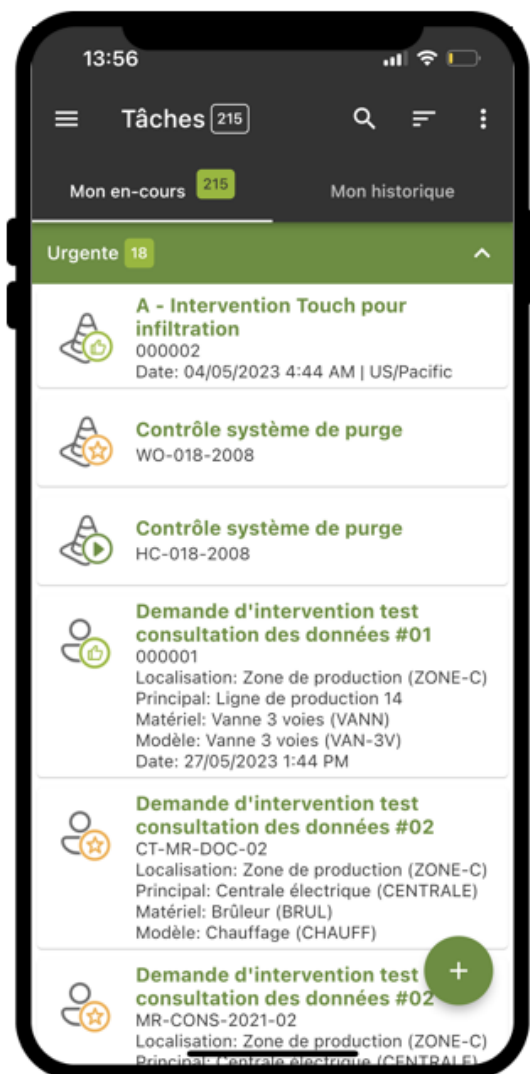
- Either the message «You are connected in time zone...», if the terminal's time zone is declared in CARL Source;
- Or the time zone selection dialogue box, if the terminal's time zone is not declared in CARL Source.

Depending on profile rights, the user can also change the CARL Touch time zone by going to the application connection settings, selecting «Date and time», then "Time zone» and then selecting another time zone:



Some general information about time zones is given below:

- When a new task is created, it is automatically recorded in the CARL Touch time zone.
- In lists, timestamped data is displayed in the entity's time zone:



- On the detail form for a reference entity (an item in the example below), timestamped data is displayed in the CARL Touch time zone.
- On the detail form for a process entity (a task in the example below), timestamped data is displayed in the CARL Touch time zone:
 - The entity's time zone may be identical to that of CARL Touch.
 - The entity's time zone may be different from that of CARL Touch. In this case, a banner at the top of the form indicates the date and time in the entity's time zone. In addition, the detail form is read-only and the fields cannot be changed.

9:46

← Boiler gasked to be changed (WO-10-009) ⋮

Europe/Paris - it is 10:46 (08/11/2024)

General

Created by
John DOE (DOE)

Priority
Normale

WO Activity type*
Maintenance Corrective (MAINT-CORR)

Start date and time*
07/10/2024 8:00 AM

End date and time*
10/10/2024 2:18 PM

Estimated time | 0:00

Equipments

Location
Building 1 (BUILD_01) ⋮

Main point
Building 1 : Heating (BUILD_01-HEATING) ⋮

Asset
Gaz boiler (BOIL_G_02) ⋮

Contract

Model
Gaz Boiler (BOILER_GAZ) ⋮

Pause Finish

5.16. Entering data

General information about data entry:

- Depending on the context, data can be entered in CARL Touch:
 - Via a virtual keyboard.
 - Or by scanning a QR Code.
- Mandatory data fields on forms are preceded by a «*» character:

Activity type*
Security control (CTRL-SECU) ▼

Start date and time*
07/12/2022 - 15:20 📅

End date and time*
15/12/2022 - 20:03 📅

Estimated time
12:00 ⌛

- Dates and times are entered via standard components:

5.17. Entering and displaying comments

Comments are generally shown in detail blocks.

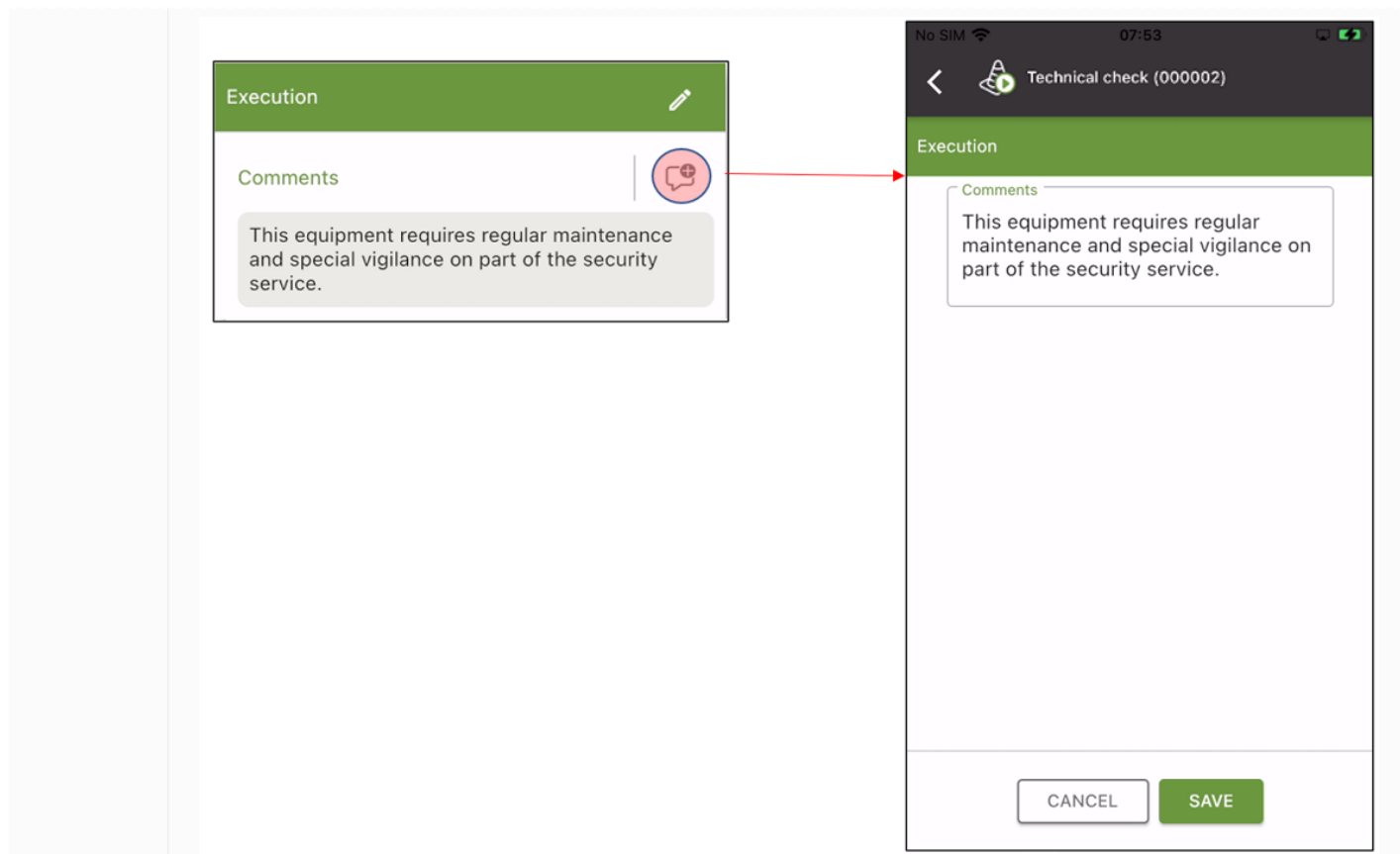
If the text of the comment is too long to be displayed fully in the detail block, it is truncated (and an ellipsis «...» is shown):

As can be seen in the diagram below, the user can then:

1. Either click on the comment **text**: this will display the entire comment on a new screen, in **read only** mode.
2. Or click on the  button: this will display the entire comment in an **input screen**, enabling the user to change the comment and save the changes if desired.

Adding a comment is initially done using this same button .





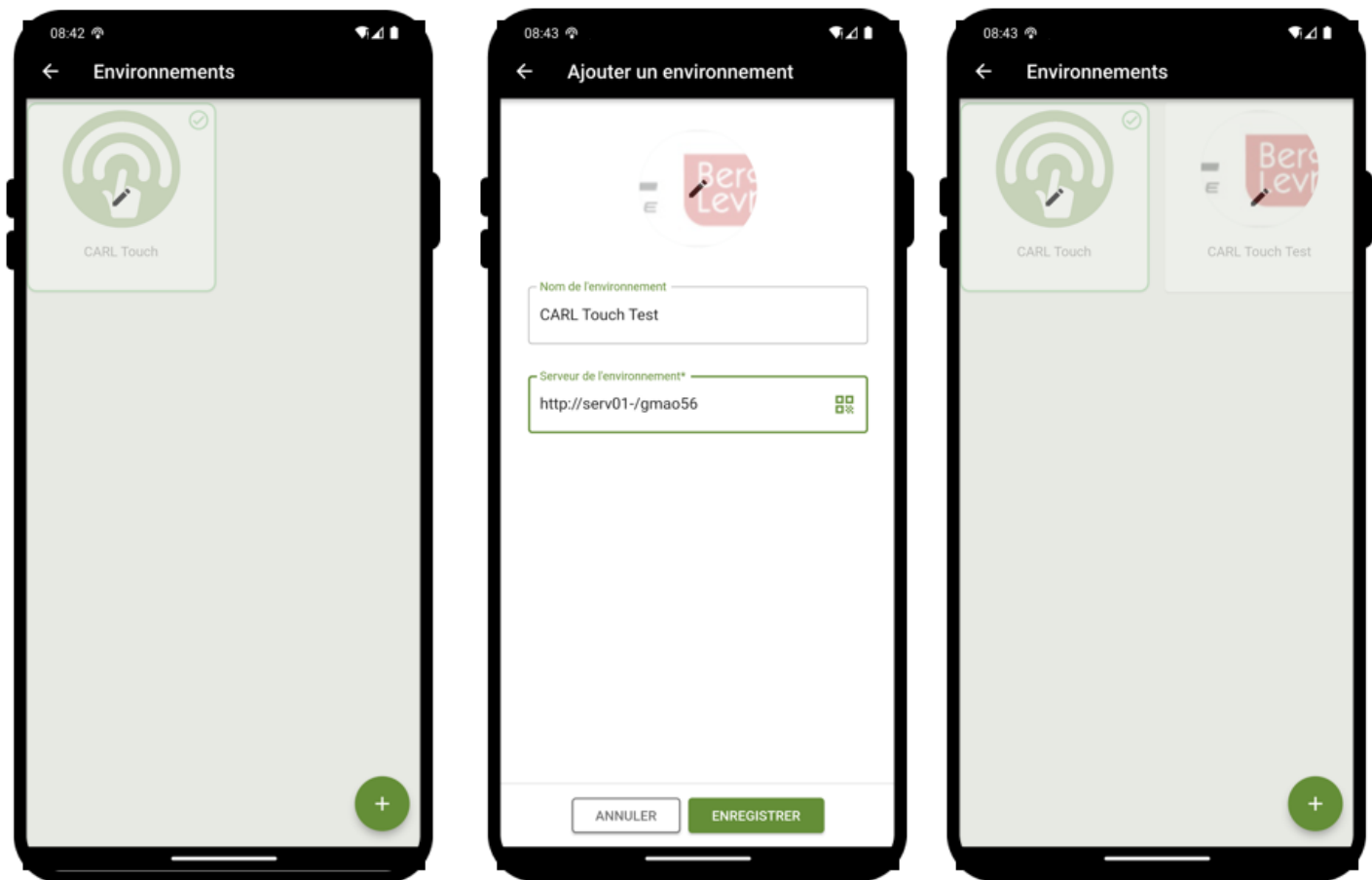
5.18. Multi-environments

Users can set up several CARL Touch environments on their devices.

The enabling of the multi-environment mode is available in the Environments menu of the Settings menu.

In edit mode, users can create multiple environments defined by:

- a logo
- the environment name
- the server address



They can also rearrange environments, by making a long press on and then dragging the environment icon.

When users select a new environment, the login screen appears.

5.19. Actions on contacts

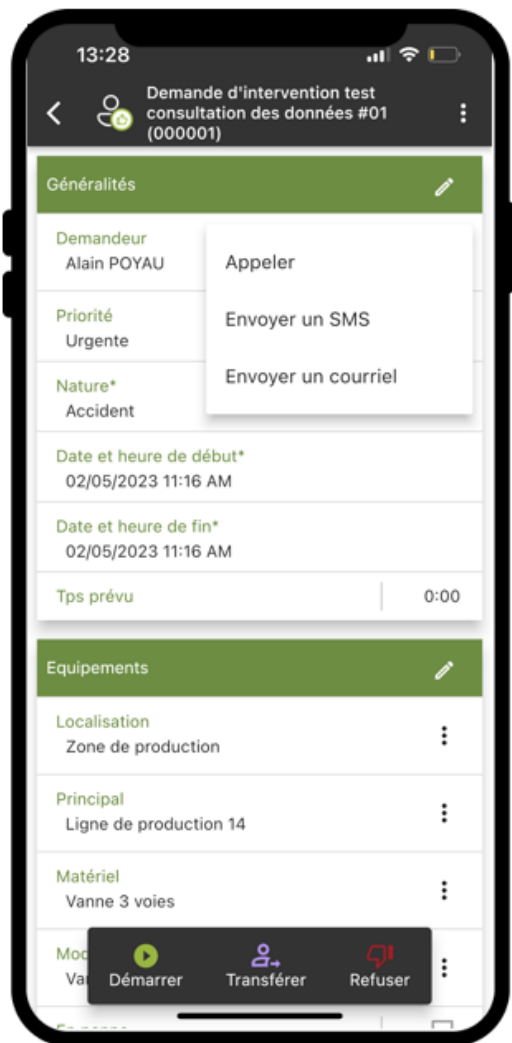
In the detail forms, a context-sensitive menu  is proposed to the right of each agent field providing contact details (Mobile phone or Email).

Selecting this menu gives access to the following actions:

- **Send an SMS:** Action available if the agent is associated with a "Mobile" number in CARL Source.
- **Call:** Action available if the agent is associated with a "Mobile" number in CARL Source.
- **Send an e-mail:** Action available if the agent is associated with an "Email" in CARL Source.

Example: Requester field for the details of a task.



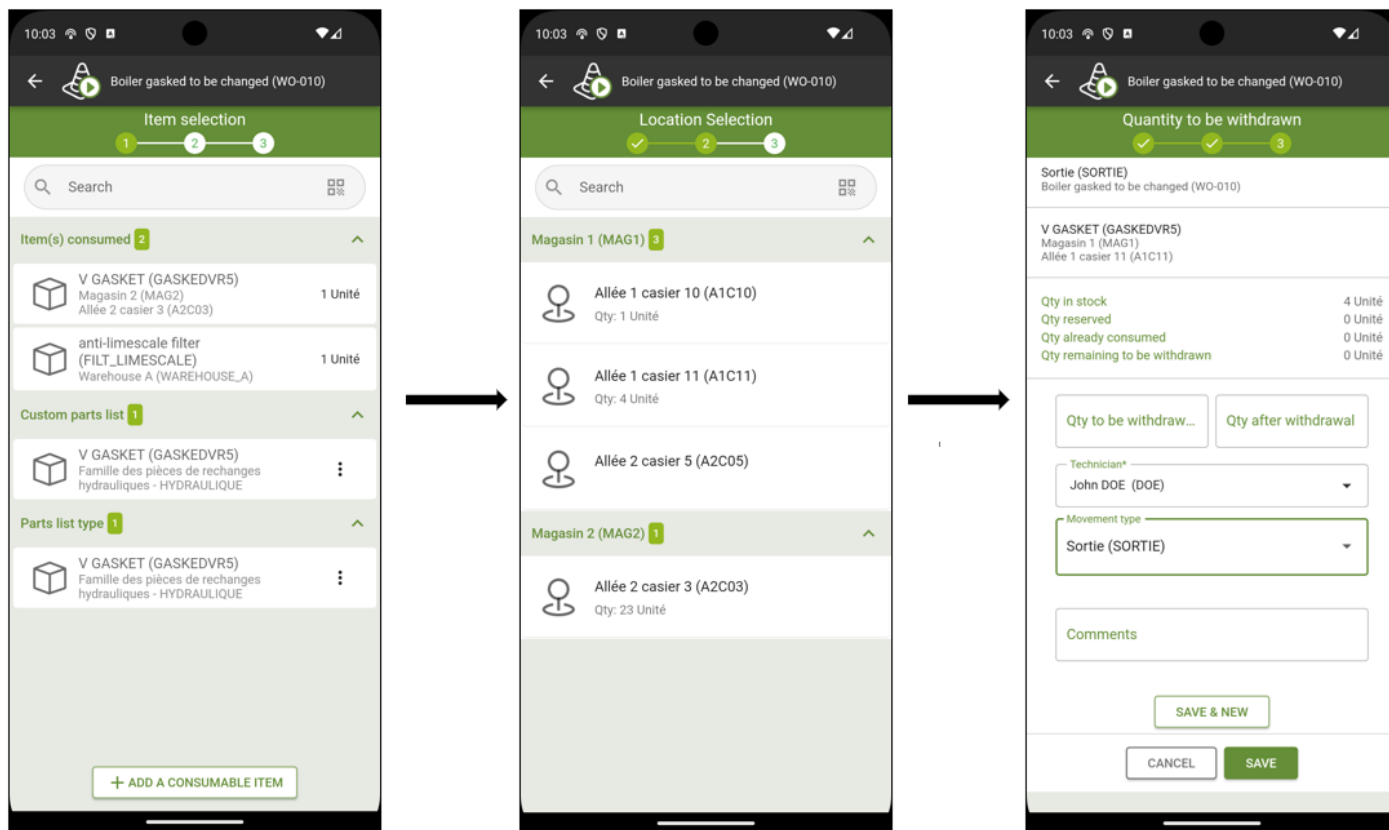


5.20. Wizards

5.20.1. Principe

Wizards are intended to **facilitate the entry** of certain data in CARL Touch by offering the user a **sequence of steps**.

These steps are shown visually via a « *step pathway* » comprising the **number of the current step** and its **name** – see the illustration below for entering a «Consumption»:



The number of steps offered by the wizard **varies** depending on the data to be entered (Entry, Withdrawal, Consumption on a task, Reading operation, etc.).

Likewise, the **wizard adapts to the current context** so as to offer only the **steps that are relevant** and thus avoid unnecessary data entry.

Illustration: Wizard associated with the "Withdrawal" sub-function (from stock)

The «Withdrawal» process comprises three steps:

1. Select an item to be withdrawn.
2. Select the location from which to withdraw the item.
3. Enter the quantity to be withdrawn.

=> During this process, if the wizard finds that the item is included in one location only, it will take the user **directly from Step 1 to Step 3** (as it would be pointless to make the user select the location if only one is available).

=> This mechanism is known as the « **Skip a step** » concept.

5.20.2. Actions

The **final step** of a wizard offers the user the following actions:

Button	Button action
	Cancel the data entered and close the wizard (if confirmed).
	Save the data entered and close the wizard.

5.21. Managing linked documents

In CARL Touch, linked documents are managed **using the «Documents» summary block on a detail form.**

When the user clicks on the « *Add media document* » button from the document summary screen, CARL Touch displays the list of available options:

Button	Button action
Browse	Used to select a file on the mobile device.
Audio recording	Used to record an audio message via the microphone on the mobile device.
Photo	Used to take a photo via the camera on the mobile device.
Library	Used to select an element from the «Library» on the mobile device (e.g. access photos stored on the device).
Text	Used to create, edit and save a text file.
Video	Used to record a video via the camera on the mobile device.

When a document is created, it is displayed in the documents summary screen with:

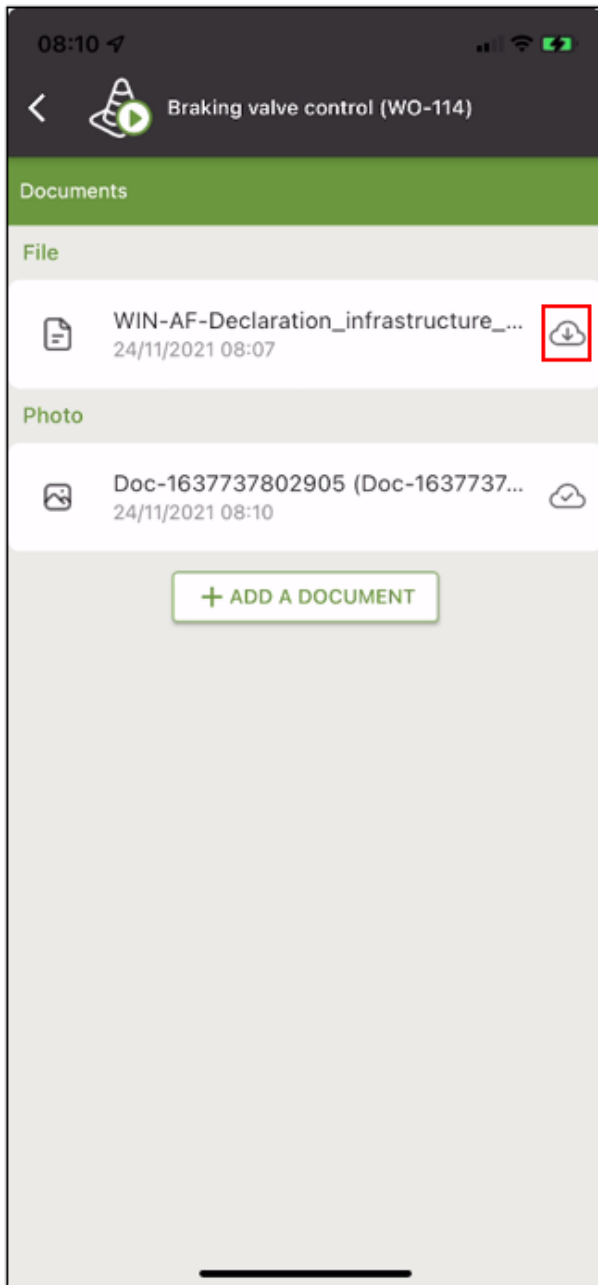
- An **icon** corresponding to the document type (see table below).
- Its **name**, which as default comprises the document type and creation date.
- Its creation **date and time**.

Icon	Associated file type
	File (e.g. file stored on the mobile device).
	Audio file.
	Photo file.  The size of an image file may not exceed the limit set in the profile settings – see. Photo resizing .
	Text file.
	Video file.  The size of a video file may not exceed the limit set out in the profile settings – see. Video compression . Once this limit has been reached, the video recording is stopped.

=> **Documents created, changed and deleted are synchronized with CARL Source.**

To avoid transferring excessively large files, a profile setting by function can be used, if necessary, to limit the size of documents transferred to CARL Touch terminals.

In the case of an overly large document, the document still appears on the list of documents, but the user can only view it by first downloading it onto their terminal.



This document size limit applies only to documents that were not created by the connected CARL Touch user.

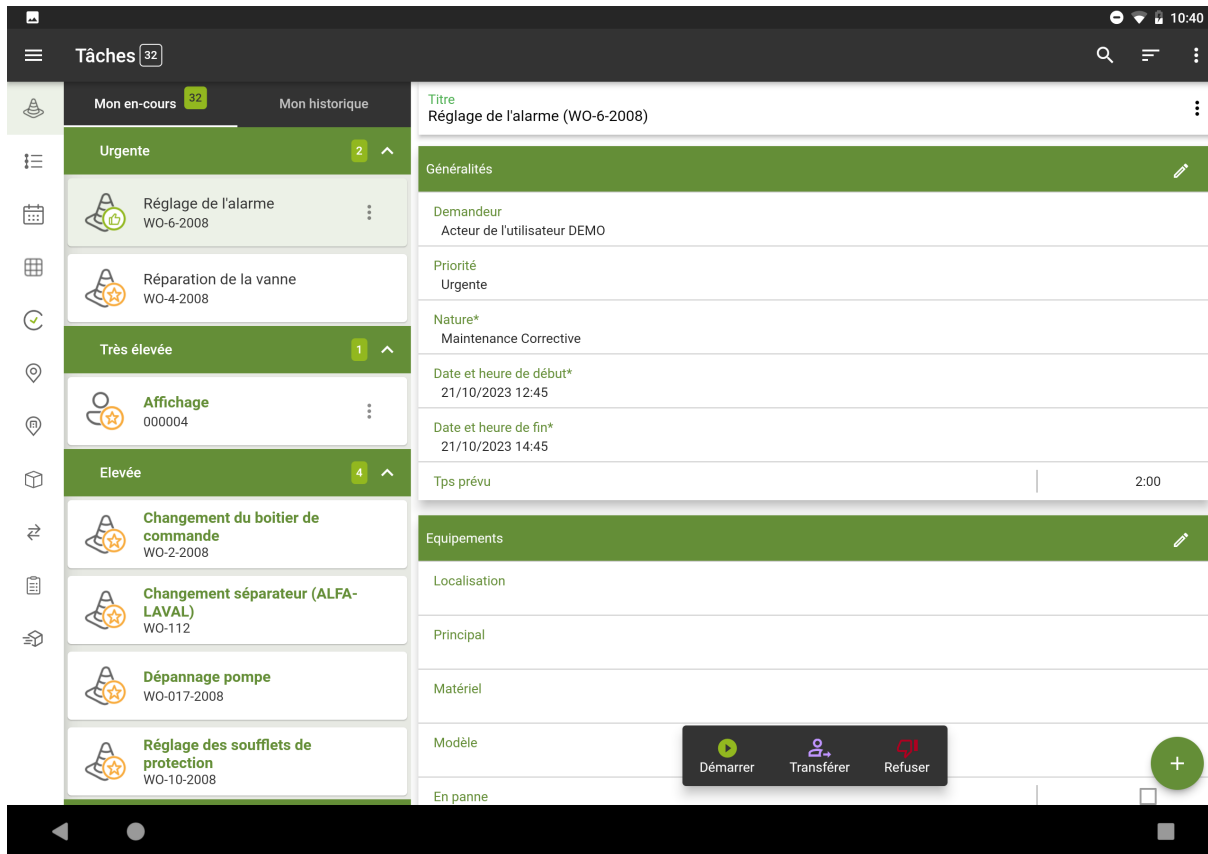
5.22. Tablet mode

5.22.1. User interface principles

When the **diagonal screen dimension** of a mobile device (smartphone or tablet) is **greater than 8 inches**, the CARL Touch user interface adapts to offer a «Tablet mode» in landscape orientation.

When this mode is enabled, information is laid out as follows:

- **One third of the screen** is reserved for the presentation of information in **«list» mode**.
- **Two thirds of the screen** are used to present the **details of the line** selected from the list.



=> All these ergonomic principles will **always be applied to the main functions** (e.g. Tasks, Assets, etc.).

=> Note that **tab management** is also incorporated in this display mode.

=> The **general menu** is located on the left of the screen in the form of icons. These features can also be accessed via the burger menu.

5.22.2. Principle of «Central activities»

«Tablet mode» also offers the use of «Central activities»: the principle is to **select on an entry activity** (e.g. creating a new element, editing a comment, entry wizard, etc.).

Example: Creation of a new task from the "Tasks" function



10:41

Nouvelle tâche

Titre

Généralités

Demandeur

Priorité

Nature*

Date et heure de début*

27/10/2023

-

10:40

Date et heure de fin*

27/10/2023

-

10:40

Tps prévu

Equipements

Localisation

Principal

ANNULER

ENREGISTRER

6. WIDGETS

Two widgets are included with the CARL Touch application. These widgets can be added to the Android™ desktop for easy access to the application and provide succinct information without opening the application.

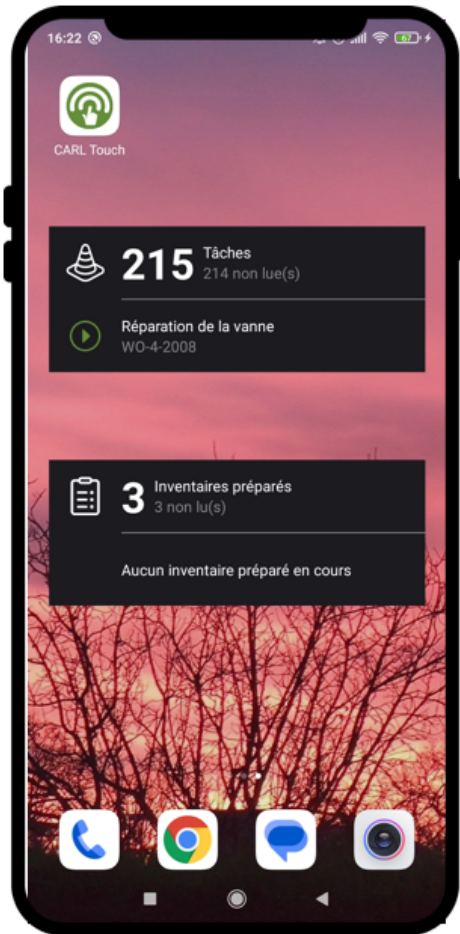


The CARL Touch widgets may be resized by the user if desired.

6.1. Indicator widgets

6.1.1. Principle

The indicator widget can be used to display real-time information about tasks or prepared inventories on the smartphone or tablet's home screen.



6.1.2. Operation

The first line of the widget displays:

- The number of tasks or prepared inventories included in the user's work-in-process.
- The number of unread elements.
Pressing this line opens the application on the list of the corresponding entity (tasks or prepared inventories).

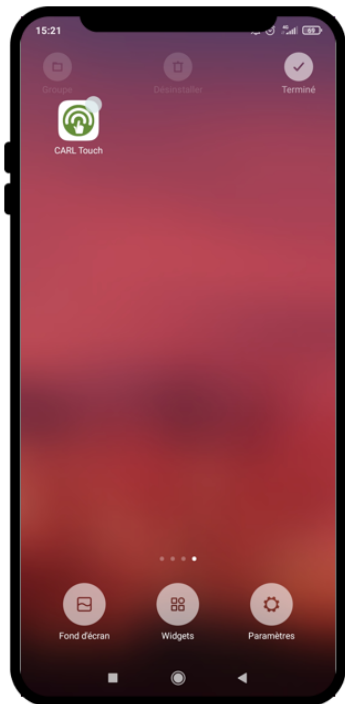
The second line contains the following information:

- The title of the current task or prepared inventory (empty if none is current).
- The status icon for the entity (accepted, started, paused, etc.).
Pressing this line opens the application on the detail form of the corresponding entity.

6.1.3. Installation

Users install the widget on their Android™ device like any other Android™ widget.

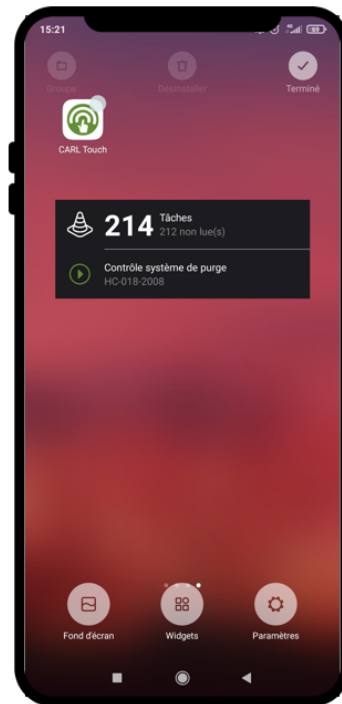
Once the widget is dropped on the Android™ desktop, a configuration window is displayed on the screen allowing users to choose the type of entity assigned to the indicator widget. Once the entity type is chosen, the widget is added to the Android™ desktop and updated.



Appui long sur le bureau
Sélection du pictogramme Widgets



Appui long sur le widget
CARL Touch pour sélection



Le widget est installé

6.2. Quick access widget

6.2.1. Principe

This widget gives quick access to the main CARL Touch user actions by scanning an element (QR Code, NFC label, 1D bar code).

6.2.2. Installation

The CARL Touch 'Actions' Widget installs like a generic Android™ Widget. No prior configuration is needed.



Appui long sur le bureau
Sélection du pictogramme Widgets

Appui long sur le widget
CARL Touch pour sélection

Le widget est installé

6.2.3. Operation

The user presses the CARL Touch Actions widget. A window is displayed. Users can scan the label:

- Either using the device’s camera, by selecting the scan button.
- Or by using the device’s physical scanner (if it has one).
- Or by using contactless NFC technology.

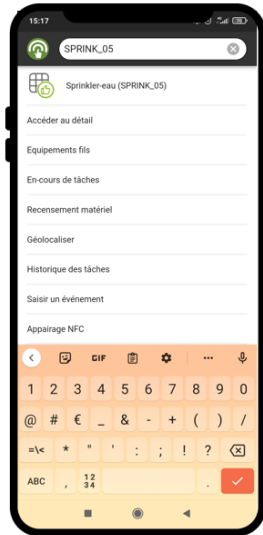
If the label scanned corresponds to an element in the CARL Touch database, the possible actions on the element are displayed. The user can then choose an action to be performed on the element identified, in which case the CARL Touch application is opened directly on the appropriate form for the selected action.

Table 1. Actions available in the widget (categorized by entity)

• <u>Task</u> ◦ Add a linked work order ◦ Geolocate ◦ Access to details	
--	--

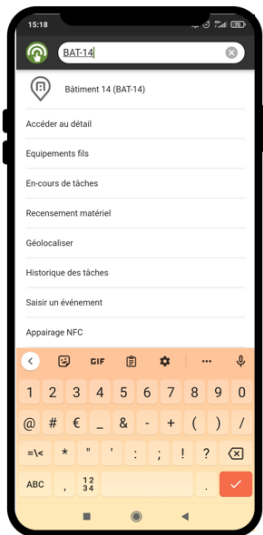
- Asset

- Access to details
- Creating a work order
- Create report
- Create a WR
- Child equipment
- Outstanding tasks
- Asset survey
- Geolocate
- Task history
- Entering an event
- Enter a reading
- NFC pairing
- Parts list



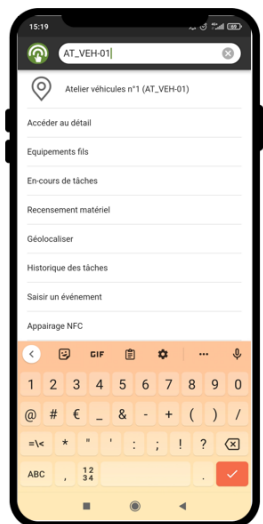
- Location

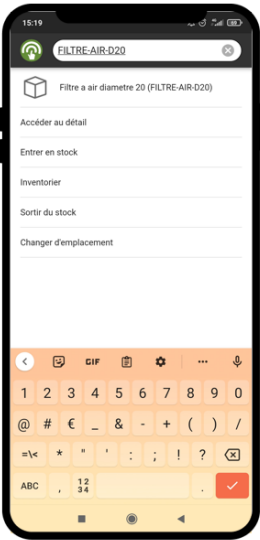
- Access to details
- Creating a work order
- Create report
- Create a WR
- Child equipment
- Outstanding tasks
- Asset survey
- Geolocate
- Task history
- Entering an event
- Enter a reading
- NFC pairing



- Main point

- Access to details
- Creating a work order
- Create report
- Create a WR
- Child equipment
- Outstanding tasks
- Asset survey
- Geolocate
- Task history
- Entering an event
- Enter a reading
- NFC pairing



• <u>Item</u> ◦ Access to details ◦ Enter in stock ◦ Perform inventory ◦ Withdraw from stock ◦ Change location	
• <u>Prepared inventory</u> ◦ Access to details	



If only one action is available, CARL Touch performs it automatically without displaying a list.

7. TASKS FUNCTION

7.1. Purpose

The «Tasks» function of CARL Touch is used to cover all that a mobile user may need to do in terms of managing work orders and work requests when in the field:

- Presentation of all available tasks for the current user.
- Synchronization with CARL Source (work orders and work requests), creation of new tasks, searching for existing tasks.
- Access to details of a task (task-specific information, direct access to item sheets).
- Possibility of accepting, rejecting, starting and stopping tasks.
- Managing operations and task-related documents directly from the mobile device.
- Geolocation, calculation of the « User $\leftrightarrow$ Task » distance, display on the map.
- Behavior suited to «off-line» contexts (when the mobile device does not have a 3G/4G or WiFi connection to the network).

7.2. Tasks list

The tasks list enables the user to browse through available tasks and immediately identify their status and main information.

7.2.1. Meaning of icons

The icons on the task list identify both:

- The **origin** of the task: «Work order» or «Work request».
- The **status** of the task: «New», «Taken into account», «Started», etc.

Table 2. Meanings of the various icons on the task list

Work order icon	Meaning	Work request icon	Meaning
	New task with «Work order» origin.		New original task «Work request.»
	Task «Taken into account.»		Task with WR origin «Taken into account»
	Task «Rejected».		Task with WR origin «Rejected».
	Task «Started».		Task with WR origin «Started».
	Task «Paused».		Task with WR origin «Paused».
	Task «Finished».		Task with WR origin «Finished».
	Task «With conflict».		Task with WR origin «With conflict».

7.2.2. Data displayed

For each task in the task list, CARL Touch displays as default the following data subject to availability (i.e. a line is displayed only if the associated data has been entered).

- **Title** of the work order (WO) or work request (WR) from which the task originates.
- **Code** of the WO or WR.
- **Start date** of the WO or WR.
- **Name and code of the asset** affected by the WO or WR.
- **Name and code of the geographic point** associated with the WO or WR.
- **Name and code of the customer** associated with the WO or WR.
- **Distance** from the work order location.
- **First line of the detailed comment** for the task.
- **Additional field *xtraTxt01*** (customizable field).
- **Additional field *xtraTxt02*** (customizable field).
- **Address** of the work order



Appearance of the **Distance** information in relation to the work order location requires that the mobile device has been able to determine its geolocation as well (i.e. has GPS coordinates or an address).

The GPS coordinates of a task are initialized automatically with the coordinates of the equipment selected in the task (requires a connection to the CARL Source server).

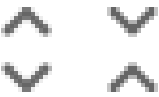


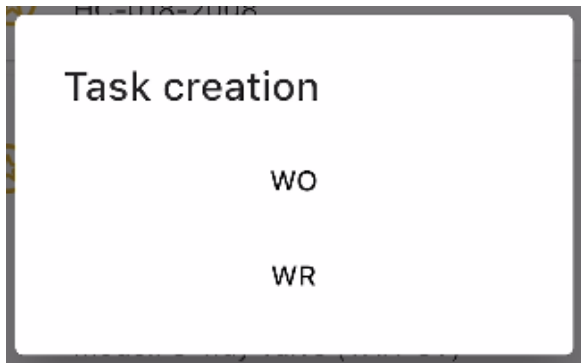
The task list is customizable, you can add some fields by customizing the task form.

7.2.3. Actions

CARL Touch proposes general actions on the tasks list form.

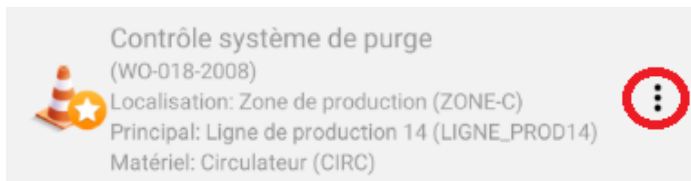
Table 3. Available actions on the task list form

Button	Button action
	Search within the tasks list.
	Add a new task: Work order / Report / WR
	Collapse or Expand grouping blocks.
	Sort the tasks.
	Tasks of my team.



Context-sensitive actions available for a task

Context-sensitive actions specific to a task are accessible via the button to the right of the task: 



Button	Button action
Geolocate	Geolocate the current task (using GPS).
Display on map	If the current task (or the asset associated with the current task) is geolocated (i.e. has GPS coordinates) or has an address, this action displays its position on a map.

7.2.4. Task list tabs

As default, there are no tabs on the tasks list: it displays the list of current tasks. However, depending on the context, up to three tabs may be displayed:

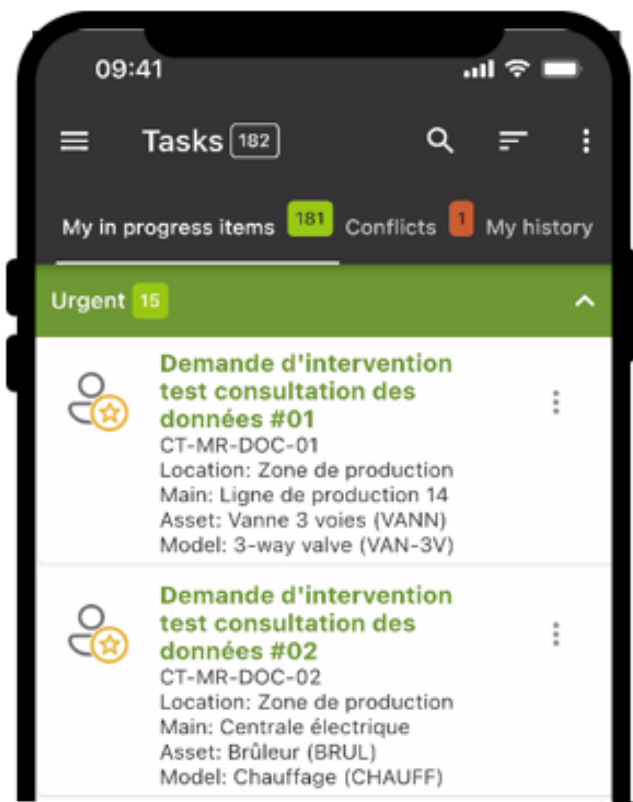
- **«MY IN-PROGRESS ITEMS» tab**: This tab is shown only if another tab («History» or «Conflicts») is displayed. It contains the list of current tasks.
- **«MY HISTORY» tab**: this tab contains tasks that have been «Completed» or «Rejected» by users until they have reset the data. This tab is always cleared with each initial synchronization.
- **«CONFLICTS» tab**: This tab contains tasks for which a conflict has been detected.



The conflict display mechanism is described in section [Managing conflicts](#).

Illustration: Tasks list when the 3 tabs are displayed





7.2.5. Focus on the "Tasks of my team"

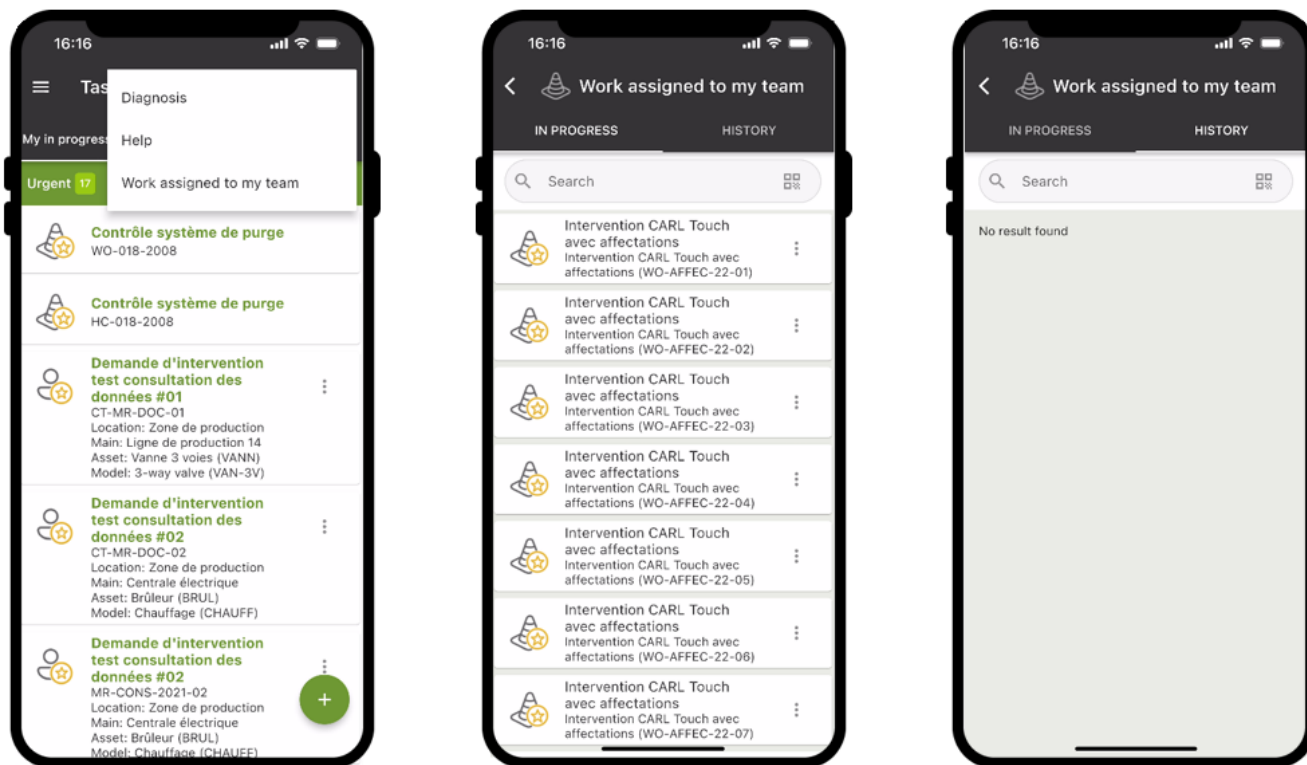
From the tasks list form, the user can consult the tasks of their team using the action button .



The "My team's tasks" action is only available if the user is associated with a Technician code (see User detail form in CARL Source).

Selecting this action gives access to a new tasks list containing two tabs:

- **"CURRENT" tab:** this tab contains the current tasks of the technician's team.
- **"HISTORY» tab:** this tab contains the "Completed" tasks of the technician's team.



Conditions for displaying tasks linked to the user's team.

Selecting the "Tasks of my team" action proposes all tasks assigned to the technicians of the connected user's work team.

This concerns tasks assigned to:

- The user's team in the planned resources (Labor tab)
- The user's team (General tab)
- An agent on the user's team (General tab)
- An agent in the user's team in the planned resources (Labor tab)



Tasks that are not assigned to the user are read only.



This action requires a connection network to the server. If this is not the case when this action is called up, the action will not return any data.

7.3. Task details – Work order

7.3.1. Presentation

The task details form provides quick, structured access to the information comprising a task, and enables these fields to be changed if necessary.

7.3.2. Data displayed



The data listed below corresponds to the structure of the «standard» form.
CARL Touch forms are customizable, implying that the form structure may be different in your context.

The task details form contains the following:

«General» block

- **Requestor** of the work order (WO) or work request (WR) from which the task originates.
- **Priority** of the task.

- **Nature** of the task.
- **Start date** of the task.
- **End date** of the task.
- **Forecast time** for the task.

«Equipment» block

- **Location**: location point for the task.
- **Functional**: functional point for the task.
- **Asset** affected by the task.
- **Template** affected by the task.
- **Failed**: failure indicator (Yes/No).
- **Stoppage time**: stoppage time for the equipment affected by the task.

«Diagnosis» block

- **Symptom**.
- **Cause**.
- **Remedy**.



- The «Person in charge» field is not displayed as default. The task details form can be customized to display this field.
- In CARL Source, the «Person in charge» field on a work order is initialized:
 1. Either by the person in charge entered in CARL Touch.
 2. Or by the person who creates the task.
- For a related work order, the «Person in charge» field is initialized:
 1. Either by the person in charge entered in CARL Touch.
 2. Or by the person in charge of the equipment.

«Performance» block

- **WR comment**: comment available if the task originates from a WR.
- **Comment**: comment available if the task originates from a WO.



The button is used to add/edit the **Comment** field.
Further details about the comment entry mechanism are given in section [Entering and displaying comments](#).

«Operations» block

- **Number of operations performed/Total number of operations planned**.



The button is used to add/edit the list of operations.
Further details about operations are given in section [«Operations» summary block](#).

«Documents» block

- **Number of documents relating to the task**.



The button is used to add/edit documents relating to the task.
Further details about document management are given in section [Managing linked documents](#)

«Consumption» block

- **Add a consumption:** this button is used to add a consumption to the task.
- If the current task has one or more consumption records, the block shows the following information for each:
 - **Name and code** of the item consumed.
 - **Warehouse** for the item consumed.
 - **Location** for the item consumed.
 - **Quantity** of items consumed – this button shows the number of units consumed and enables the quantity to be changed if necessary.



Further details about consumptions are given in section [«Consumption» detail block](#).

7.3.3. Actions

CARL Touch proposes general actions on the task detail form, as well as actions specific to the fields of a task.

Actions available on the task detail form (via the  button)

Button	Button action
Add a linked work order	Create a new task linked to the current task. The link is not hierarchical. If this new work order is created with its status set to «In preparation», it is not displayed in the list of current tasks once it has been saved, but CARL Source sends a notification to CARL Touch to inform the user that the work order «Code - Title» has been saved properly.
Geolocate	Geolocate the current task (using GPS).
Display on map	If the current task (or the asset associated with the current task) is geolocated (i.e. has GPS coordinates) or has an address, this action displays its position on a map.

Context-sensitive actions available for task fields

Context-sensitive actions specific to task fields are accessible via the  button to the right of the field.

Field	Button available	Button action
All fields in the «Equipment» block	Show details	Displays the detail screen for the selected element.
	NFC pairing	Pairs the selected element.
	Geolocate *	Geolocates the current element (using GPS).
	Display on map *	If the selected element is geolocated (i.e. has GPS coordinates) or has an address, this action displays its position on a map.
	Tasks in progress	Displays tasks in progress for the selected element.
	Task history	Displays the history of tasks for the selected element.
	Child equipment	Consults child links for the selected element.
	Asset survey	Allows you to perform an asset survey for the selected element.
	Entering an event	For entering an event for the selected element - See Entering an event .
	Parts list	Displays the individual parts list of the selected element (Action only available for the asset field).
	Create a task	Creates a new task based on the selected element (action only available for the asset field).
	Create report	Creates a new report based on the selected element (action only available for the asset field).

* Button available only if the profile setting «Authorize geolocation of equipment for a task» is enabled.

Actions available on the task detail form

The actions below are shown at the bottom of the screen when the task detail form is displayed:

Button	Name	Button action
	"Take"	The task is taken into account by the user.  - When a user «accepts» a task, they become the only user to keep this task in their list (i.e. the task is no longer shown on other users» mobile devices). - From the CARL Source perspective, the user is recorded in the «Assigned to» field on the work order (note that this field is not displayed in the standard version: to access them, they must be added by customizing the form). Under no circumstances should the "Assigned to" field be editable in CARL Source forms. This field must remain read-only if it is displayed.

Button	Name	Button action	
	«Reject»		The task is rejected by the user. - When the user rejects a task, it is re-dispatched to all users to whom it was originally addressed. Task dispatch rules are explained in section Rules for distributing tasks between users. - The possibility of rejecting a task depends on the settings set in the user's profile. - A rejected task is recorded in the «History» tab on the task list.
	«Start»	The task is set to «Started.»	
	«Pause»		The task is set to «Paused». Depending on the user's profile settings, the user may be required to enter a «Reason for pausing» when this action is selected.
	«Finish»		The task is set to «Finished». A finished task is recorded in the «History» tab on the task list.
	«Transfer»		The task is transferred. The possible addressees depend on the configuration of the transfer action. This button is available for tasks that are «Accepted», «Started» or «Paused». A task may be transferred to an agent, a skill, a team or to scheduling.
	«Restart»		The stored task is restarted. - This button is available for a stored task (i.e. displayed in the «MY HISTORY» tab). - The restarted task status changes to «Started» and the task moves from the «MY HISTORY» tab to the «MY CURRENT» tab.

7.3.4. «Diagnosis» block

Task diagnosis information is managed in the «Diagnosis» block of the task.

This block comprises three fields: symptom, cause, and remedy.

Diagnosis 
Symptom Leak
Cause Part breakage
Remedy Stop the engine

To change these three fields, users must select the «Edit» mode on the Diagnosis block.

Diagnosis	
Symptom	Leak
Cause	Part breakage
Remedy	Stop the engine



17:16

<

Pump troubleshooting (WO-017-2008)

Diagnosis

Symptom
Leak (LEAK)

Cause
Part breakage (BREAKAGE)

Remedy
Stop the engine (STOP)

CANCEL
SAVE

When the lists of symptoms, causes and remedies are called up, the troubleshooting assistance for the asset or model to which the task relates is taken into consideration.

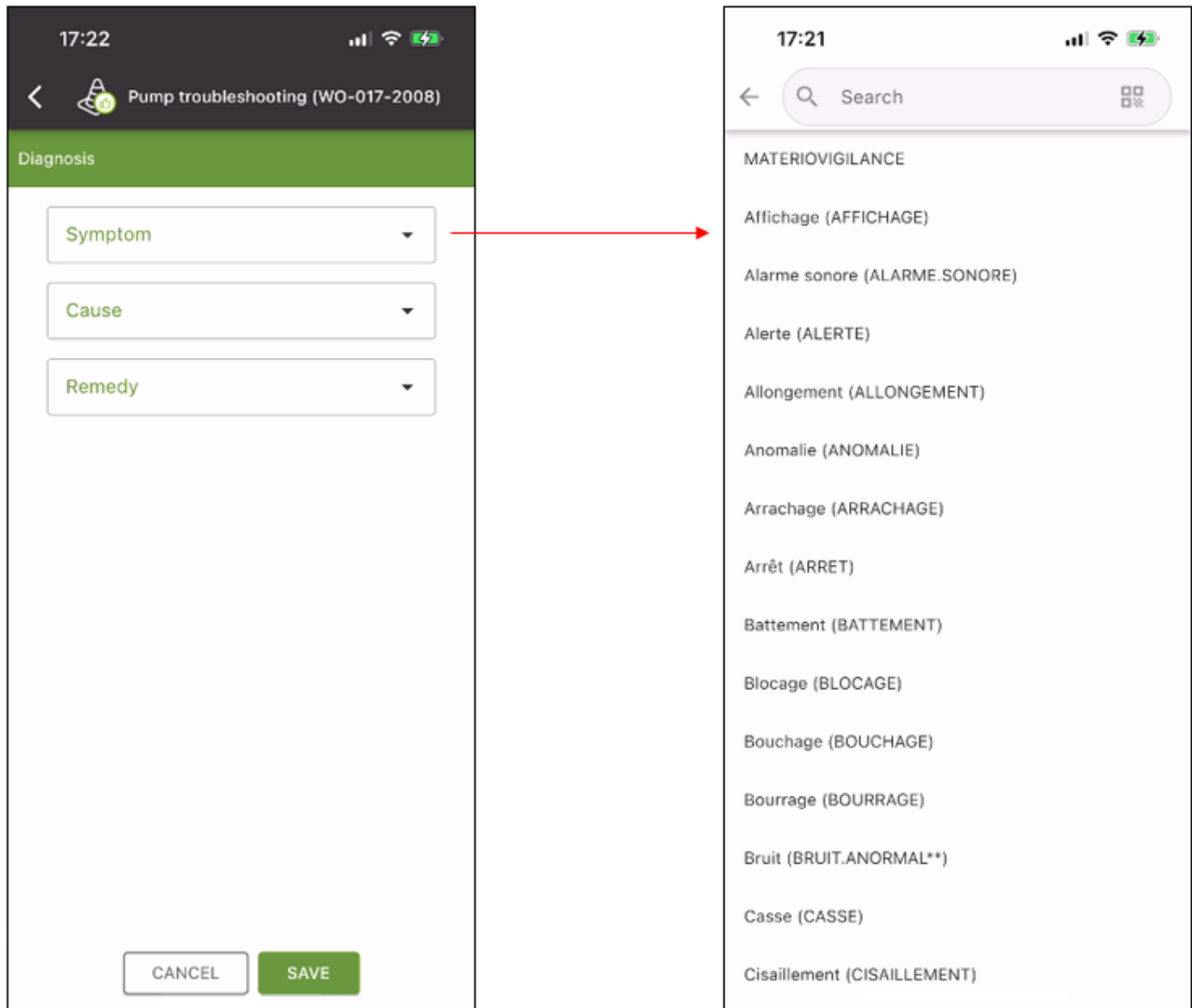
If the asset specified on the task has troubleshooting assistance, CARL Touch will initially propose only known symptoms for the task asset (or the task model if the asset does not have a failure tree).

The user can then select a known symptom for the asset if it matches the observed symptom, or can request the full list of symptoms by selecting the «Add a symptom» button".

Selecting a symptom

CARL Touch will initially show the user the symptoms from the troubleshooting assistance for the asset specified on the task, or the model specified on the task if there is no failure tree for the asset.

If neither the asset nor the model have troubleshooting assistance, CARL Touch will directly show the full list of symptoms.



Selecting a failure cause

CARL Touch will initially show the user the known failure causes for the symptom selected, taken from troubleshooting assistance for the asset specified on the task or the model specified on the task if there is no failure tree for the asset.

If there is no known cause for the symptom selected, CARL Touch will directly show the full list of failure causes.

17:26

<  Pump troubleshooting (WO-017-2008)

Diagnosis

Symptom
Leak (LEAK) X ▼

Cause ▼

Remedy ▼

CANCEL SAVE



17:27

< Search 

Filtre d'entrée (FILTRE-ENTREE)

Inducteur (INDUCTEUR)

Induit (INDUIT)

Isolement moteur (ISOLEMENT-MOTEUR)

Mauvaise manipulation de l'utilisateur (MANIPULATION)

Panneau diodes (PANNEAU-DIODES)

Part breakage (BREAKAGE)

Porte balais (PORTE-BALAIS)

Relais (RELAIS)

Rotule HS (ROTULE-HS)

Roulement (ROULEMENT)

Sonde (SONDE)

Tiroir Alim (TIROIR-ALIM)

Transfert (TRANSFERT)

Selecting a remedy

CARL Touch will initially show the user the known remedies for the symptom and cause selected, taken from troubleshooting assistance for the asset specified on the task or the model specified on the task if there is no failure tree for the asset.

If there is no known remedy for the symptom and cause selected, CARL Touch will directly show the full list of remedies.

17:32

<  Pump troubleshooting (WO-017-2008)

Diagnosis

Symptom
Leak (LEAK) X ▼

Cause
Part breakage (BREAKAGE) X ▼

Remedy ▼

CANCEL SAVE

17:27

< Search 

Boucher le trou (COVER)

Changer le circuit (CHANGE)

Effectuer un relevé de mesure (MES)

Enlever l'objet coincé (MOVE)

Remplacement de l'organe défectueux (REMP)

Stop the engine (STOP)

17:27

< Pump troubleshooting (WO-017-2008)

Diagnosis

Symptom
Leak (LEAK) X ▾

Cause
Part breakage (BREAKAGE) X ▾

Remedy
Stop the engine (STOP) X ▾

CANCEL SAVE

17:37

< Pump troubleshooting (WO-017-2008)

Diagnosis

Symptom
Leak

Cause
Part breakage

Remedy
Stop the engine

Execution

Comments

Operations
0 operations performed of 0 >

Documents
0 document(s) linked to the task >

Consumption

Start Transfer Reject

Labor reporting

The diagnostic information is stored on the task.



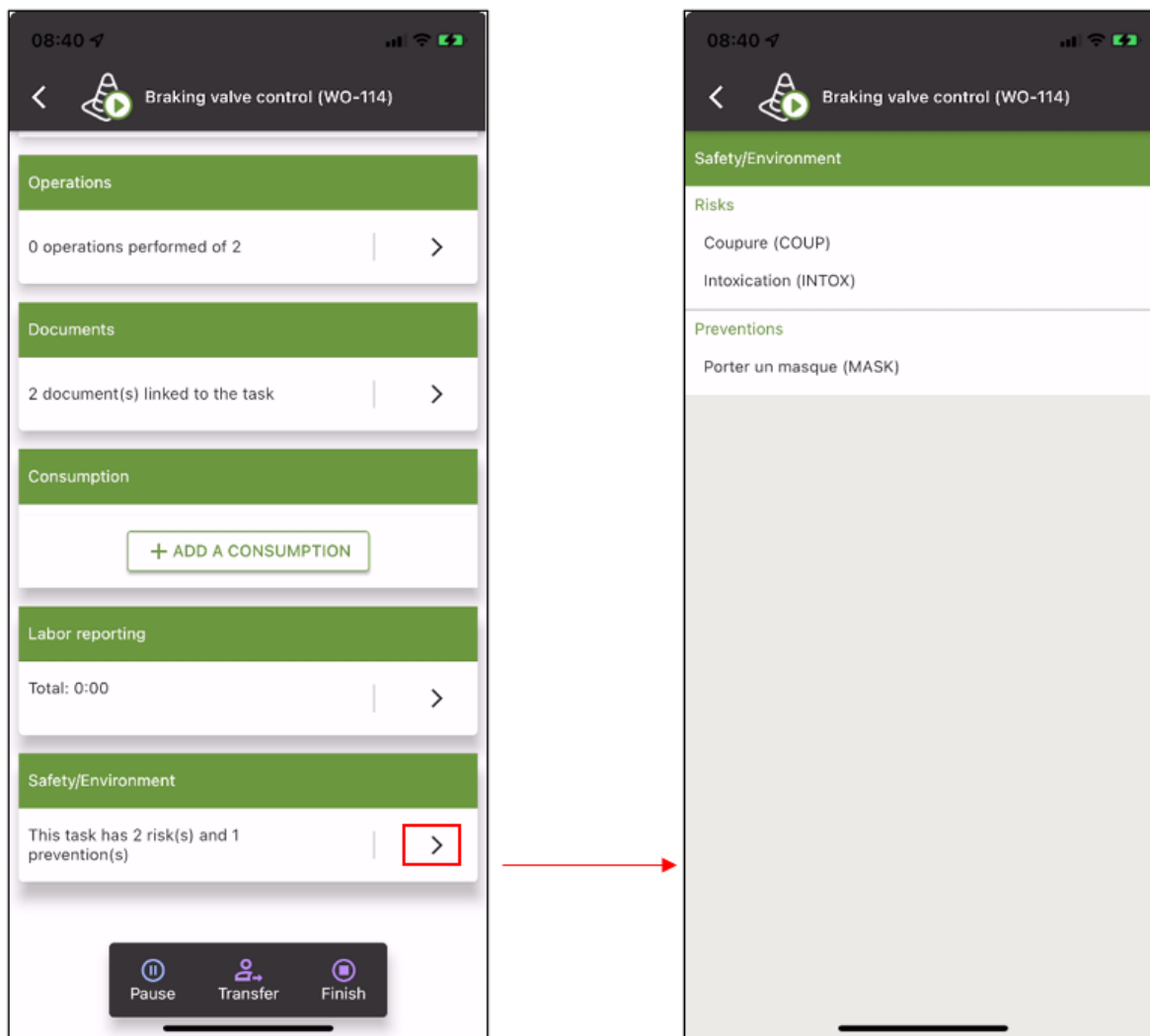
Lists of symptoms, causes and remedies as well as asset and template fault trees are continuously available: i.e. with or without a network connection.



The "Impose a strict failure tree" profile setting blocks the entry of a symptom code, cause, or remedy outside of troubleshooting assistance predetermined by the back-office. In this case, the buttons for accessing the complete list of values are not present.

7.3.5. «Safety» block

The safety guidelines can be consulted in the «Safety» block for a task.



The lists of risks and preventive measures cannot be changed in CARL Touch; the risks and preventive measures displayed are those from the «Safety» tab of the CARL Source work order.

7.3.6. «Operations» summary block

Operations are managed using the «Operations» block of the task details screen.

When the user clicks on the «Add operation» button from the operations summary screen (accessible via the  button), CARL Touch displays the list of available operations on the first tab and the list of available work order templates on the second tab. It is important to note that:

- The list of operations and work order templates are **available off-line** (and are downloaded when the mobile device data is initialized).
- The list of operations enables **multiple operations to be selected**: the user can select one or more operations from the list – the selected operations will be automatically retrieved, in the selected order, when the screen is confirmed.
- The list of work order templates allows you to copy **the work order template operation**: the user can select a work order template from the list – the operations of the selected work order template will be automatically retrieved when the screen is confirmed.
- A QR Code corresponding to the operation code can be scanned from this list to select an operation.



The user can select **multiple operations** from the list.
The operations selected will be repatriated to the summary screen when the **"save"** button is clicked



The user can select a work order template from the list.
The operations of the work order templates will be repatriated in the summary screen when the **"save"** button is clicked.



The operations returned are sorted in the order in which they were selected on the selection list.

There are several types of operations:

- **"Simple"** operations of "check" type: the procedure is considered to be either 'Performed' or 'Not performed'. "Simple" operations are defined in CARL Source by the "Standard" category.
- **"Diagnostic"** type operations: the technician completes the operation and makes an assessment. "Diagnostic" operations are defined in CARL Source by the "Diagnostic" category.
- Operations of the **"reading"** type: the technician selects a reading point from the list of available reading points and enters the reading value. «Reading» operations are defined in CARL Source by the «Reading» category.
- **"Asset movement"** operations: there are three possible movements: installation, removal, or replacement. "Asset movement" operations are defined in CARL Source by the "Asset movement" category.
- **"Choice"** type operations: the technician completes the operation and selects a value from the proposed list. "Select" operations are defined in CARL Source by the "Select" category.



Standard screens are provided for customizing operations depending on the type of operation.

7.3.7. Details of an operation

Presentation

The detail form for an operation can be displayed by selecting the operation description in the list of operations for the work order.

Details of operation data



The data listed below corresponds to the structure of the «standard» form.
CARL Touch forms are customizable, implying that the form structure may be different in your context.

Operations forms can be customized for each individual operation. See the «[General tab](#)» section for further details.

The operation details form contains the following:

«General» block

- **Performed:** Date on which the operation is performed.
- **Comment:** Comments on the operation.
- **Expected duration:** Estimated time to perform the operation.

«Equipment» block

- **Location:** Location point for the operation.
- **Main:** Main point for the operation.
- **Asset** affected by the operation.

«Diagnosis» block

- **Assessment:** Location point for the operation.
- **Reservation number:** Main point for the operation.

«Reading» block

- **Reading point:** Reading point at which a reading is to be taken.
- **Old value:** Old value of the reading.
- **Value read:** Value read at the reading point.
- **Correction reading:** If the reading a correction reading?

«Documents» block

- **List of documents:** documents relating to the operation.
- « * *Add a media document » button: Used to add a document to the operation

7.3.8. «Consumption» detail block

The «Consumption» detail block is used to identify the reference(s) of consumable items used while performing the task, and record new consumption of items for the task. Item reservations are also shown.

Item consumption is entered in three steps.



the operating principles for wizards are set out in section [Wizards](#).

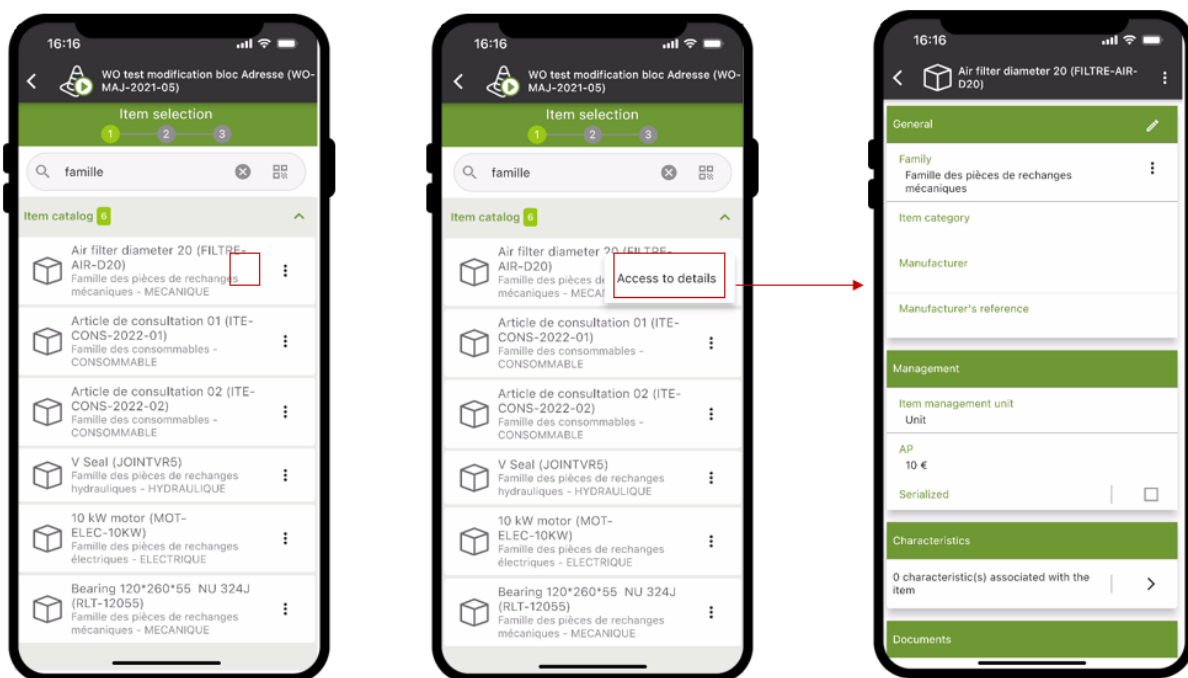
Step 1: Select a stored item to be consumed

When the «Add a consumption» button is pressed, Step 1 of the stock withdrawals wizard is displayed, i.e. the list of **stored items**.

This list has the following special features:

- The list displays the **names** and **codes** of stored items.
- The items are shown in grouping **blocks**:
 - **Custom parts list:** these are stored items taken from the custom parts list for the asset affected by the task.
 - **Standard parts list:** items from the parts list for the model associated with the task.
 - **Item catalog:** all stored items in the catalog.
- The user can search for an item by entering its code or name in the **search pane** or by directly scanning a **QR Code**.

- Press the  icon to display the « **Access to details** » option, which offers **direct access** to the item detail sheet:



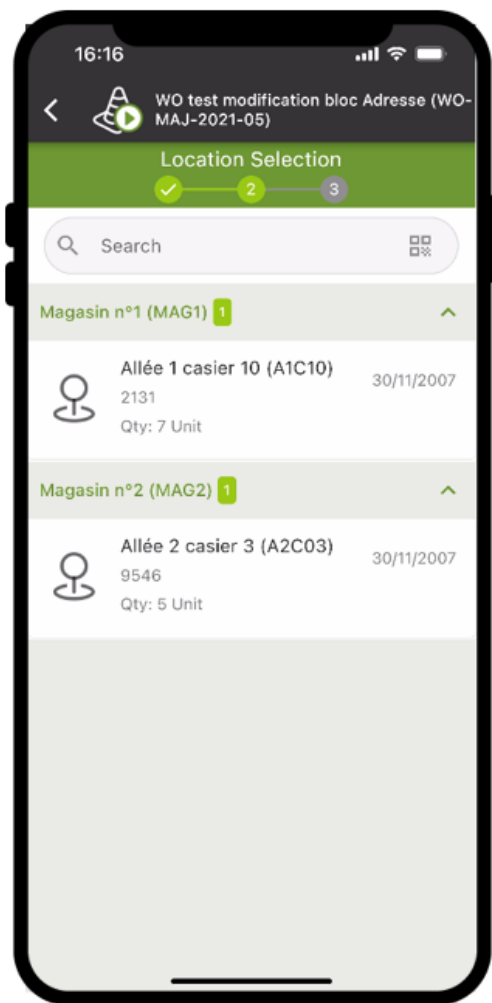
- **The selection of an item from the list (by clicking on the item) triggers the next stage in the consumption process, i.e. access to Step 2.**



The list of stored items enables users to select **one item at a time** for each consumption (i.e. the list does not allow multiple items to be selected).

Step 2: Select the batch affected by stock withdrawal: warehouse and location

When an item is selected from the list of items (see previous step), a screen is displayed for selecting the batch affected by stock withdrawal. CARL Touch then displays the storage details for the selected item.



There are two possible scenarios if the stock module has not been synchronized:

- **If the mobile device has a network connection:** CARL Touch queries CARL Source and retrieves all the item storage information.
- **If the mobile device does not have a network connection:** CARL Touch allows the user to select a warehouse and location for the consumption. However, as the item storage information is not stored locally in off-line mode, the item may not be physically located in the selected warehouse and location.

Each storage detail line for the selected item displays the following information where available:

- **Name and code of the storage warehouse.**
- **Name and code of the storage location.**
- **Batch number** (for a batch-managed item).
- **Asset name and code** (for serialized items).
- **Quantity in stock** of the item for the current batch.
- **When a line is selected**, CARL Touch displays a window for entering the quantity consumed – see next step.

Step 3: Enter the quantity consumed

CARL Touch displays a window summarizing the item **name** and **code**, and the **quantity** in stock for the warehouse, location and batch selected during the previous step.

The user can then **enter** a quantity consumed, expressed in the storage unit for the item:

- The user can now either:
 - **cancel** their entry: in which case the consumption is lost.
 - **confirm it by "Save"**: In this case, CARL Touch displays a summary window for consumption confirmation - see next step.

1. Update consumption on the task

After the consumption is confirmed, CARL Touch updates the information in the «Consumption» block on the task detail to show the consumption.

=> Regardless of the number of item entry/reinstatement movements, this screen shows a **precise summary view** of consumption for a task.

7.3.9. Focus on «Signature» block

The «Signature» block allows the client to add a handwritten signature directly on the touch screen on the device (tablet, smartphone), such as to indicate that the task has been completed by the technician.

1. Prerequisites

The «Signature» block is not part of the blocks displayed as default in the detail form of a task.

Consequently, in order to display and edit the Signature data, proceed as follows:

- Go to the [Form customization](#) function in the CARL Touch module in CARL Source,
- Duplicate the «Details of a task» TASK-DET-DEFAULT form (see section [Duplicating a form](#)), then customise it by displaying the following attributes and making them editable («Displayed» and «Editable» columns):
 - BLOCK13 *
 - signature
 - signatory

- email
- commentSign
- signatureDate



*** Comments on the BLOCK13 attribute**

- As default, the signature attributes are placed beneath BLOCK13, but it is entirely possible to associate them with another block (by changing the values in the «Order» column).
- As default, BLOCK13 is a detail block. It is possible to change it to a summary block (by checking the «Summary» column), and thus obtain the following information: « 0 or 1 signature associated with the task ».

2. Statuses on which the signature is conditional

Signature is authorized with some task status values but not others.

Signature is authorized with the following status values:

- Task « **Started** » originating from a Work order  or WR .
- Task « **Paused** » originating from a Work order  or WR .

Signature is not authorized with the following status values:

- Task being created or New task received originating from a Work order  or WR .
- Task « **Taken into account** » originating from a Work order  or WR .
- Task « **Rejected** » originating from a Work order  or WR .
- Task « **Completed** » originating from a Work order  or WR  :
 - The task can no longer be signed.
 - Once a signature has been added, it can no longer be changed.

3. Data displayed in the «Signature» block

- **Signature:** touch area for signing with a finger.
- **Signing party:** last name and first name of the person signing.
- **Email:** email address of the work order report addressee.
- **Signature comment:** area for a comment by the signatory so that any reservations or additional information can be mentioned.
- **Signature date:** date and time automatically entered when the signature is applied.

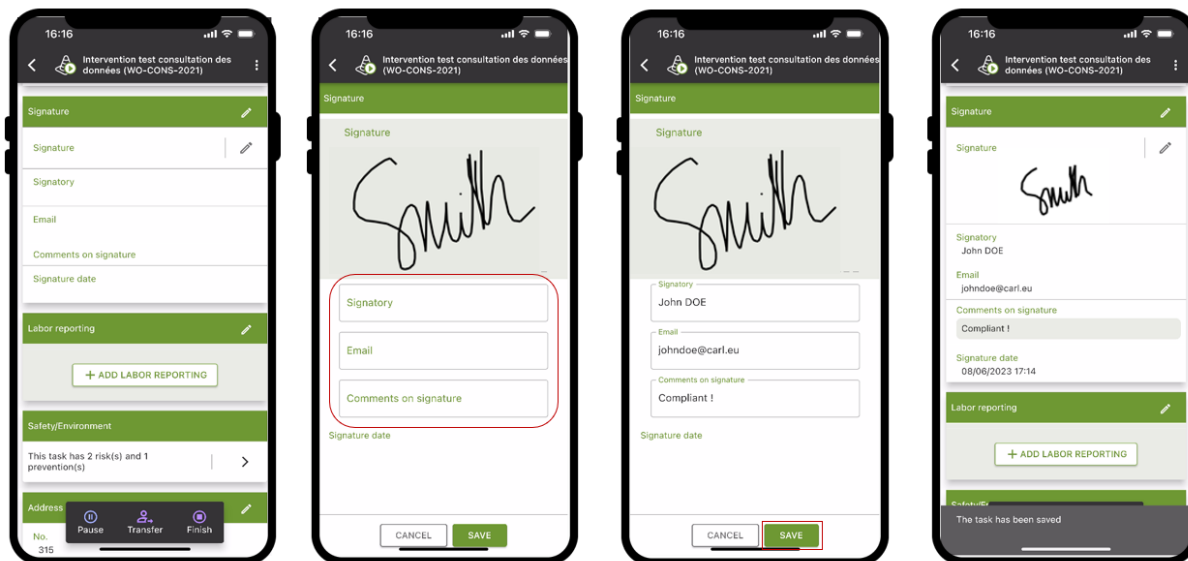
4. Illustration of the signature input process

1.

The technician clicks on the  icon.

2. The client adds a handwritten signature.

3. The client enters their last name/first name (or the email address of the Work order recipient) and a comment if desired.
4. Once the data has been entered, the following options are available:
 - **Cancel:** the «Signature» block is reset,
 - or **Save:** CARL Touch automatically applies a date/time stamp to the signature recording - the «Signature» block displays the signature in miniature and the corresponding data.



- By clicking in the signature area, the user can view it in the actual format.

Using the  icon, the user can directly **enter/edit** the signature.

1. For entering:



If the user clicks on the  icon, CARL Touch presents a blank screen for entering a signature. Once the signature has been entered, it is possible:

- **Cancel:** the «Signature» block displays the empty [Signature] field.
- or **Save:** CARL Touch automatically applies a date/time stamp to the signature recording - the «Signature» block displays the signature in miniature in the [Signature] field.

2. For editing:



If the user clicks on this icon , CARL Touch does not present the previous signature and instead presents a blank screen allowing a new signature to be entered.

Once the new signature has been entered, it is possible:

- **Cancel:** the «Signature» block displays the previous Signature in miniature in the [Signature] field.
- or **Save:** CARL Touch automatically applies a date/time stamp to the new signature recording - the «Signature» block displays the new signature in miniature in the [Signature] field.

5. Contextual action: Reset signature

The « *Reset signature* » action associated with a task already signed is accessible via the form.



button located in the upper right of the

Button	Button action
Reset signature	Displays the message « <i>This reset deletes the signature and its corresponding data. Are you sure?</i> ». => «Yes»: the «Signature» block is reset, => "Cancel": the current signature and corresponding data are kept.

6. Special case: A signature is required for work acceptance on a work order.

If «Acceptance of work» is requested for a work order in CARL Source, the corresponding task in CARL Touch can be finished only:

- if it has been signed («Signature» field),
- **and** the name of the signatory has been filled in («Signatory» field).

7. Status correspondence between CARL Touch and CARL Source

When the user finishes a task («Finish» button) in CARL Touch, the status of the corresponding work order (and potentially the WRs having originated the work order) is automatically updated in CARL Source according to the following table:

Is «Acceptance of work» requested in CARL Source?	Has a signature been added in CARL Touch?	Status automatically updated in CARL Source
Yes	No (signature not displayed)	=> "Completed" status
Yes	Yes	=> "Closed" status
No	No	=> "Closed" status
No	Yes	=> "Closed" status



- If a work order originated from one or more WRs,
- **and** «Acceptance of work» is requested for these WRs in CARL Source,
- **and** the task corresponding to the work order is signed in CARL Touch,

=> **Then** the status of the WRs and the work order is set to «Closed» in CARL Source.

7.3.10. «Labor» block

The «Labor» block is used to manage the labor types consolidated on the task.

Labor types for tracking activity time are also managed automatically (see [Activities](#)).

There are three different modes for the management of labor types (see [Labor management mode](#)).

- Automatic mode:
Labor types are deduced automatically by CARL Source using data sent by CARL Touch when a task is paused, transferred or closed.
- Semi-automatic mode
This mode suggests to CARL Touch users a labor type deduced from their activity in CARL Touch. This mode enables users to amend their labor type before sending it to CARL Source and to add other technicians who worked on the same work order.
- Manual mode:
This mode enables users themselves to declare labor types for a task. There is a data entry wizard for the manual addition of labor types. In manual mode, no labor types are calculated automatically.

Each of the three modes is described in detail below:

1. Automatic mode

In automatic labor mode, the consolidation of labor types on a task is carried out seamlessly for CARL Touch users. For the following steps

of a task workflow: "**Paused**", "**Transfer**", or "**Finish**", CARL Touch transfers the data needed to automatically create a labor type in CARL Source.

- The labor is created for the technician associated with the CARL Touch user agent.
- The labor is assigned to the technician's default time type.
- The labor duration is equal to the time between pausing, transferring or closing the task and the date/time that the task was started or restarted. The minimum duration of a labor type is one minute.

2. Semi-automatic mode

In semi-automatic mode, CARL Touch offers users a form to confirm the calculated labor types.

For the following steps of a task workflow: "**Paused**", "**Transfer**", or "**Finish**", CARL Touch offers the following form:

The screenshot shows a mobile application interface for labor reporting. At the top, the status bar shows the time 16:16 and signal strength. Below the status bar is a navigation bar with a back arrow and a bell icon, followed by the text 'Intervention test consultation des données (WO-CONS-2021)'. The main content area has a green header bar with the text 'Labor reporting calculated'. Below this, the technician's name 'John Doe (DOE)' is displayed. Underneath the name, the default time type 'Horaires : 8h00 - 17h30 (JOURNEE)' is shown. To the right of the time type, the calculated labor duration '0:09' is displayed. Below the time type, the date and time of the labor '08/06/2023 17:11' are shown. At the bottom of the form, there are two buttons: a white 'CANCEL' button and a green 'SAVE' button.

The following data is displayed:

- The name and code of the technician.
- The name and code of the technician's default time type.
- The date and time of the labor.
- The duration of the labor.
- The labor type (optional: depends on the labor type entered).
- The comment associated with the labor.

Actions available on this form

The following actions are available on the labor validation form:

- **Add a labor type:** This action is used to declare a labor type for one or more additional technicians. A labor type is added by

means of a wizard.

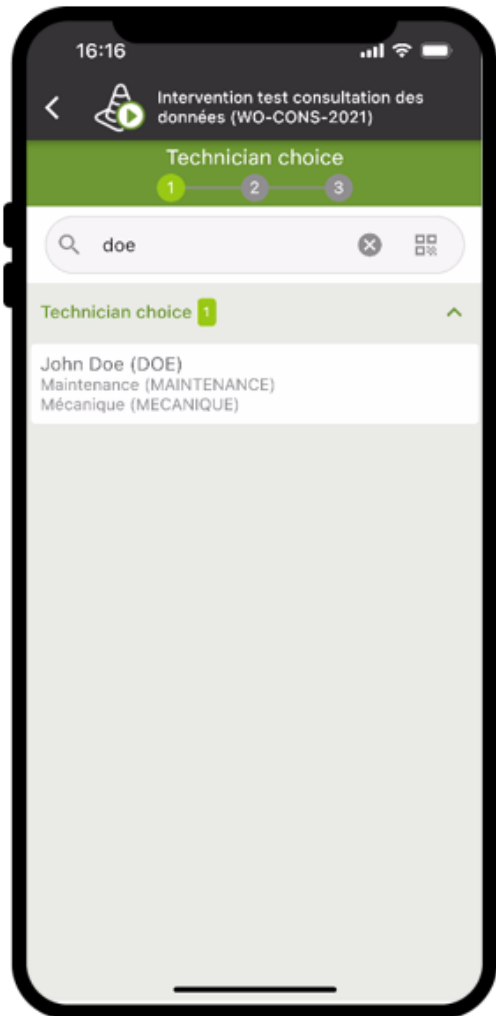
- Clicking on « **Save** » creates the labor type(s) on this form on the CARL Source work order.
- Clicking on « **Cancel** » results in the data entered being discarded.

Add a labor type

A labor type can be added by means of a three-step data entry wizard.

Step 1 – Selecting the technician

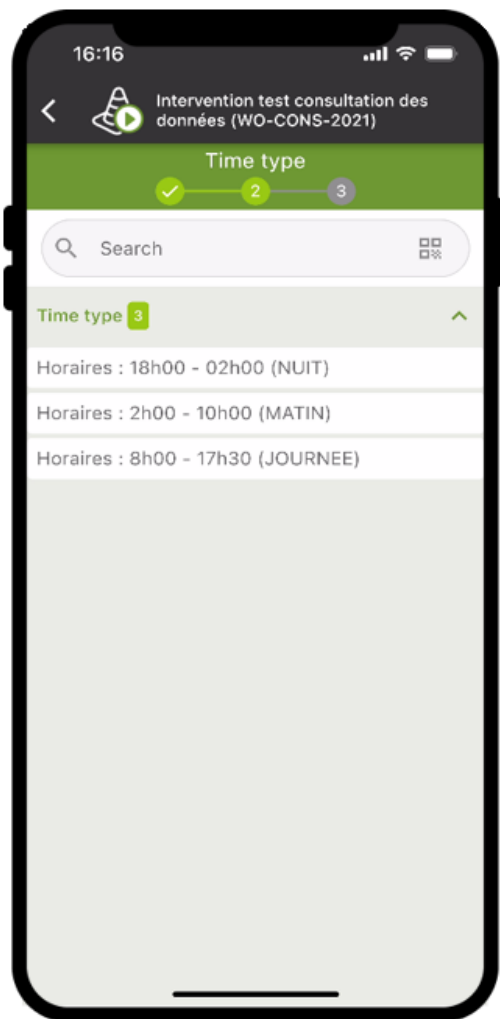
In Step 1, the list of «active» technicians is displayed. A connection to the CARL Source server is required to initialise this list. If the network is not available, users can enter or scan the code for the technician for whom the labor is to be created.



Users must select the technician from the list offered. CARL Touch then moves to step 2 of the data entry wizard.

Step 2 – Selecting the time type

Step 2 enables users to select the labor time type from the time types defined for the selected technician.



If the user has a default time type or has only one time type, step 2 is skipped and the wizard passes directly to step 3.

Step 3 – Entering the labor time

Step 3 enables users to finalise the addition of a labor type. The labor type is initialized with the same date/time and duration as the labor type calculated by CARL Touch.

However, users can change the date, time and duration of the labor, and the nature if needed, using the buttons associated with each of these fields.

Users can also enter a comment using the  button.

16:16

< Intervention test consultation des données (WO-CONS-2021)

Time

✓ ✓ 3

Technician
John Doe (DOE)

Time type
Horaires : 8h00 - 17h30 (JOURNEE)

Start date and time*
08/06/2023 - 16:25

Time*
1:00

Labor reporting type
Préparation technique (PREPARATION)

Detailed name

CANCEL SAVE

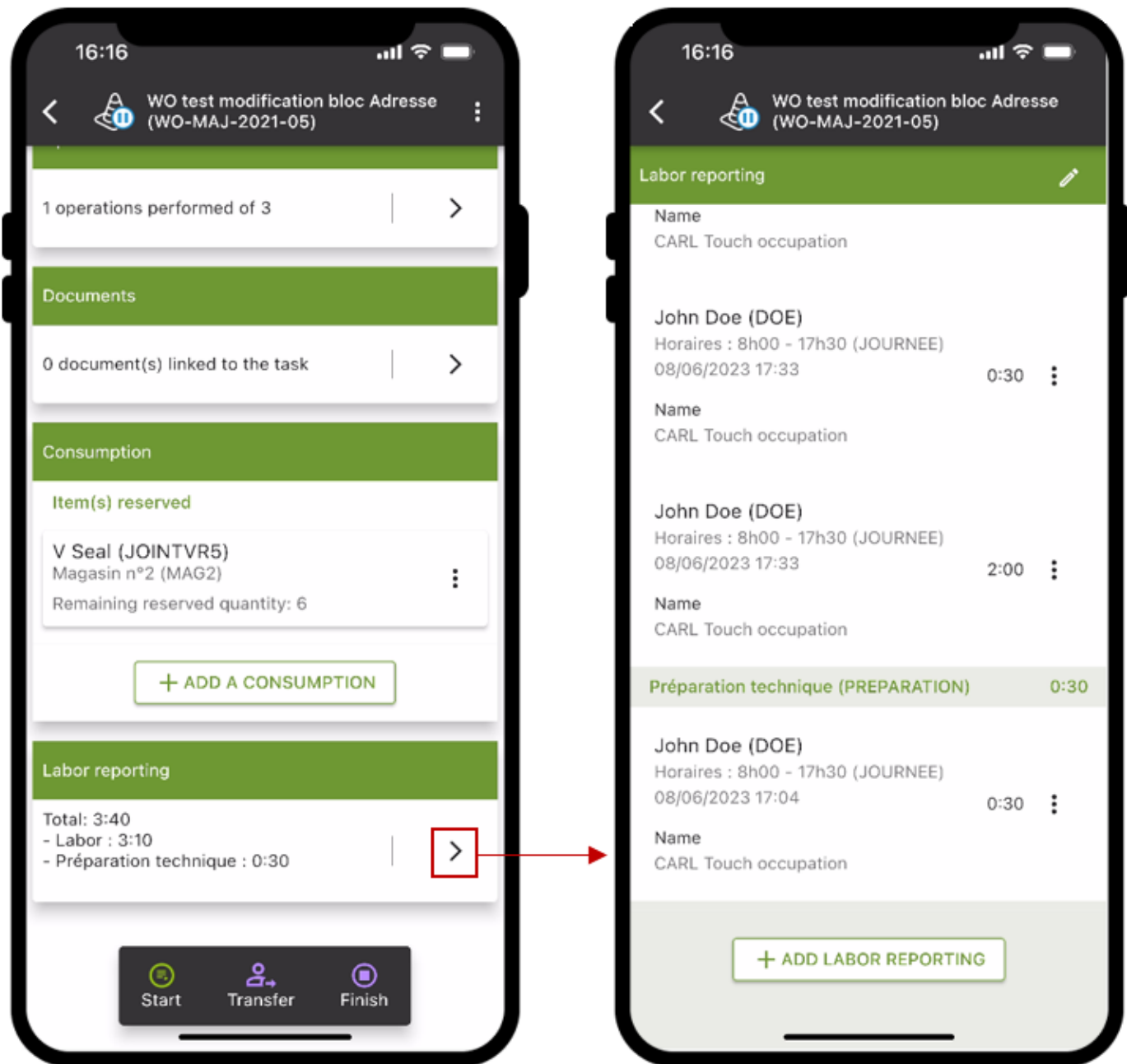
Actions available on the form for this step

The following actions are available on the labor validation form:

- Clicking on « **Confirm** » results in the labor being added to the list of labor types calculated by CARL Touch.
- Clicking on « **Cancel** » results in the labor data entered being discarded.

3. Manual mode

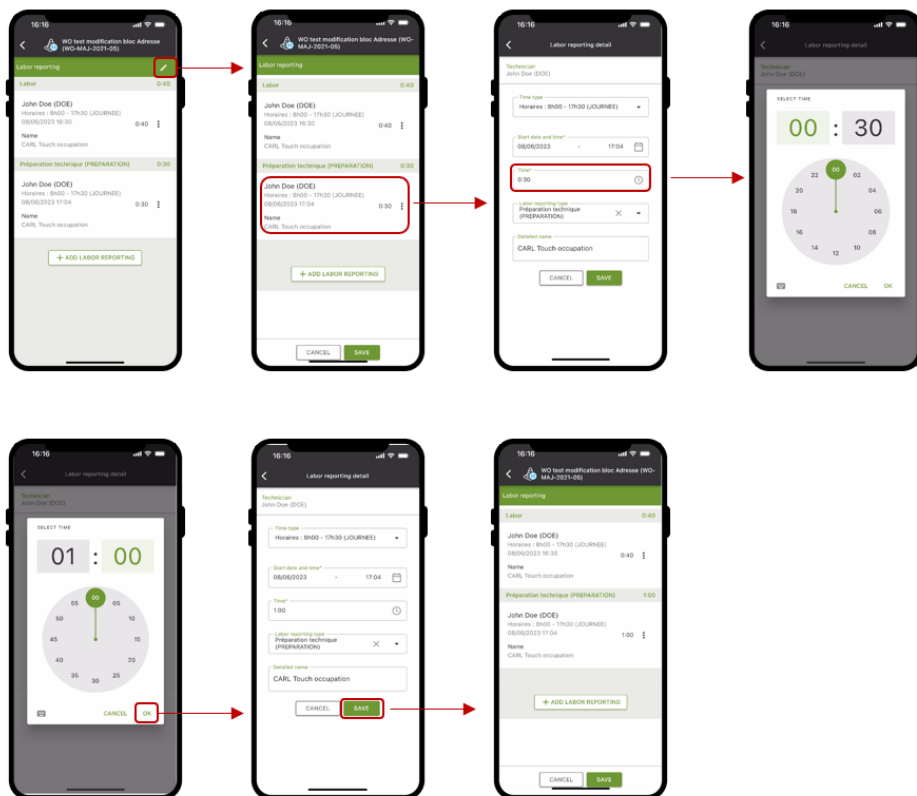
In manual mode, no labor types are deduced or proposed to users. The CARL Touch users must manage task labor types themselves. To do so, they must select the «Labor» block for the task.



From the «Labor» block, users can:

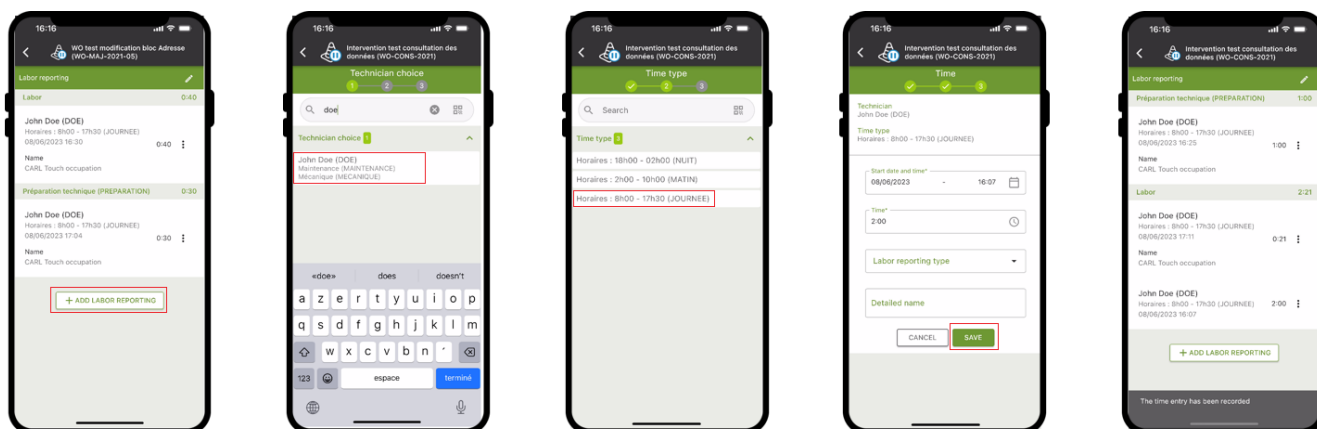
- **Edit a labor type**

Example: Editing the duration of the labor



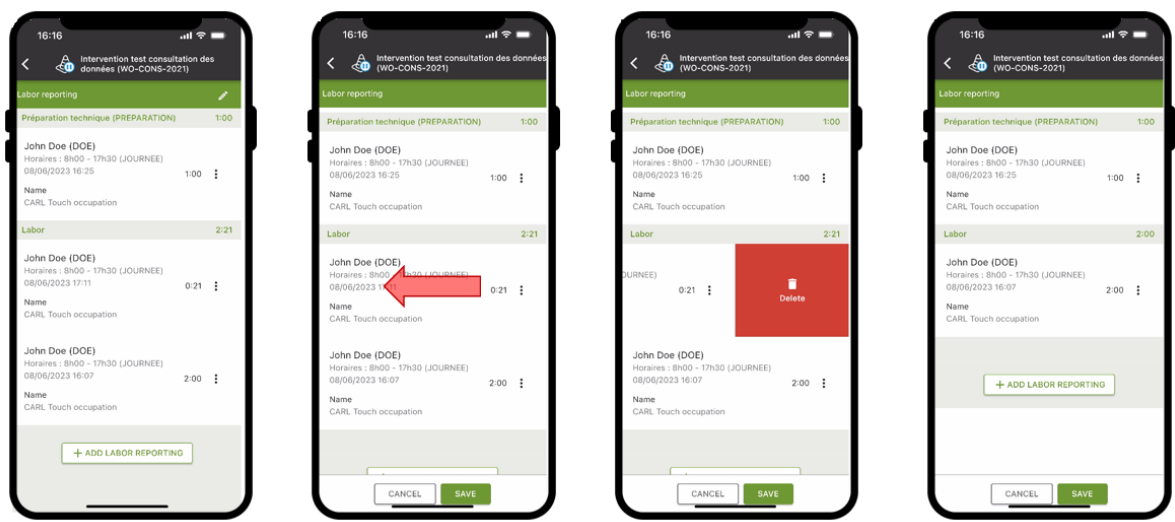
• Add a labor type

The principle of adding a labor type is described in section entitled [Semi-automatic labor mode](#).



• Delete a labor type

To delete a labor type, users must **edit** the «Labor» block, then slide to the left the labor to be deleted and then press the Delete button.



Context-sensitive actions available for labor fields

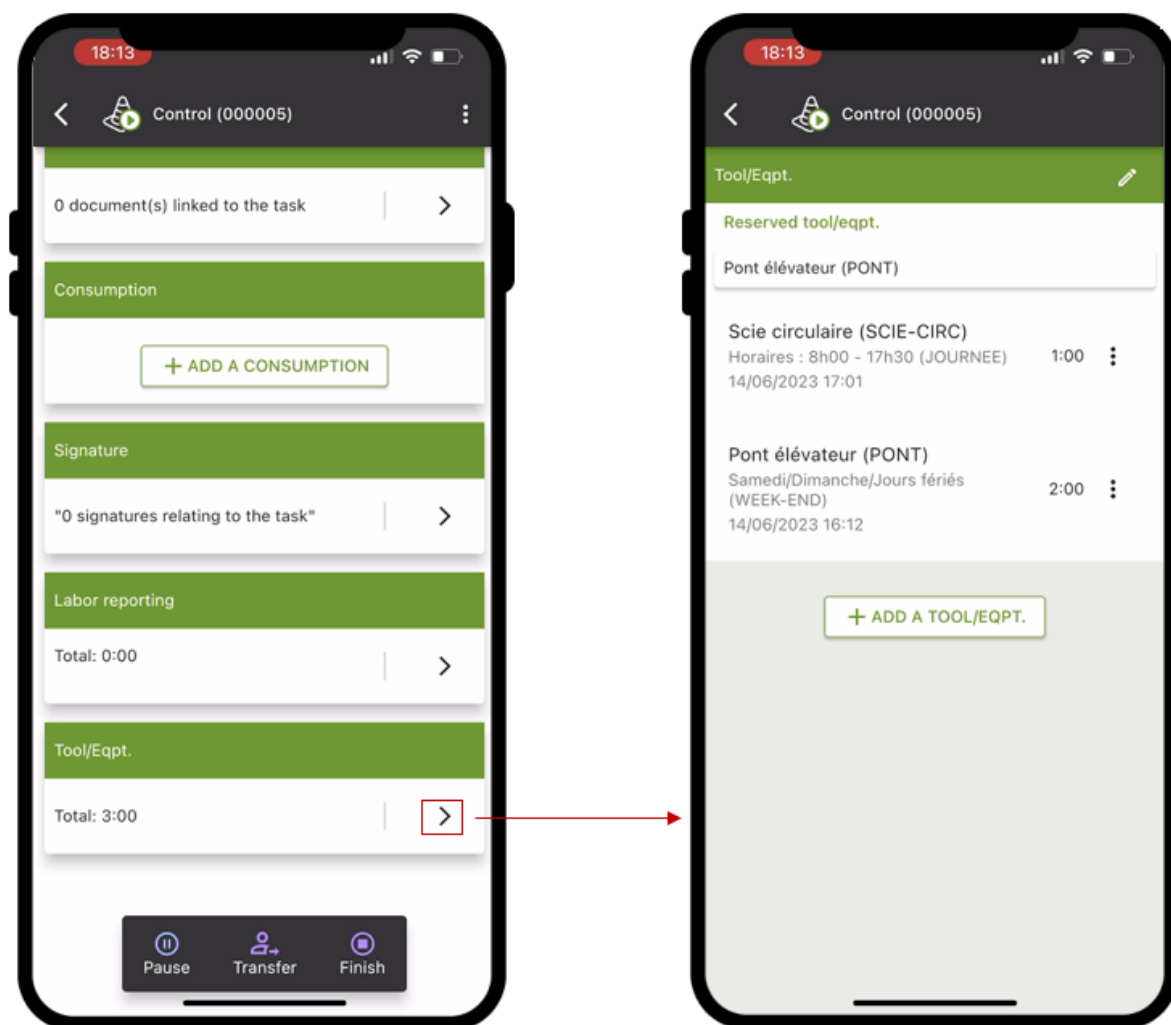
Context-sensitive actions specific to labor fields are accessible via the  button to the right of the field.

Field	Button available	Button action
All fields in the «Labor» block	Copy for another technician	Copy the current element.

7.3.11. «Material resources» block

The «Material resources» block is used to manage the labor types of material resources for the task.

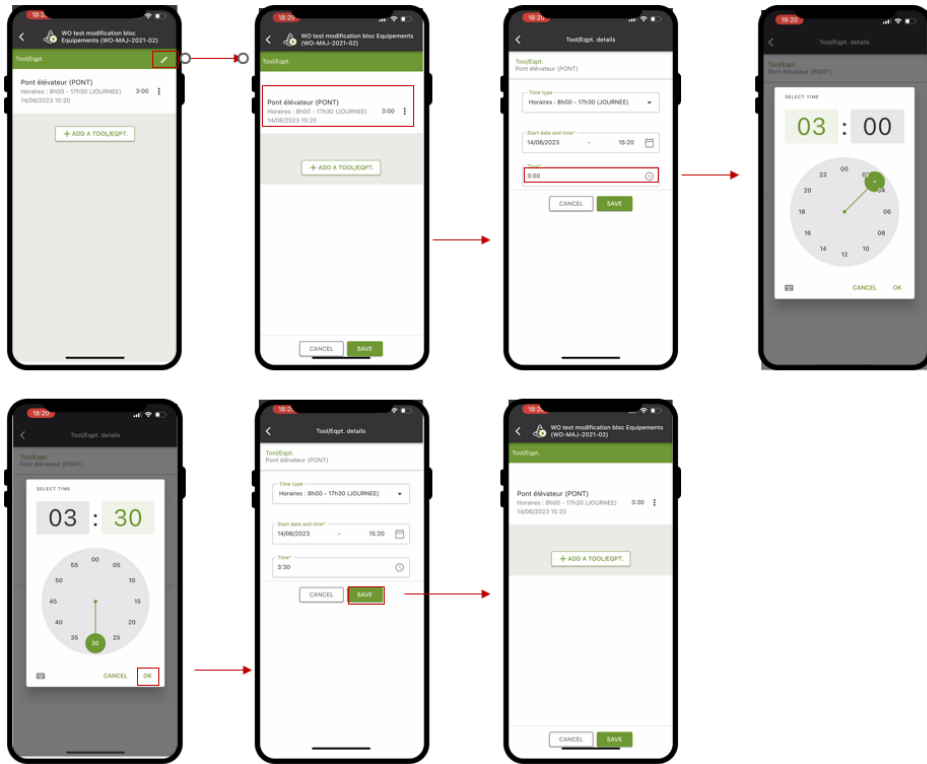
To do so, the task’s «Material resources» block must be accessed.



From the «Material resources» block details, users can:

- **Edit a labor type of a material resource**

Example: Editing the labor duration of a material resource



- **Adding a labor type of a material resource**

A labor type of a material resource is added by means of a three-step data entry wizard.

Step 1 - Select a material resource

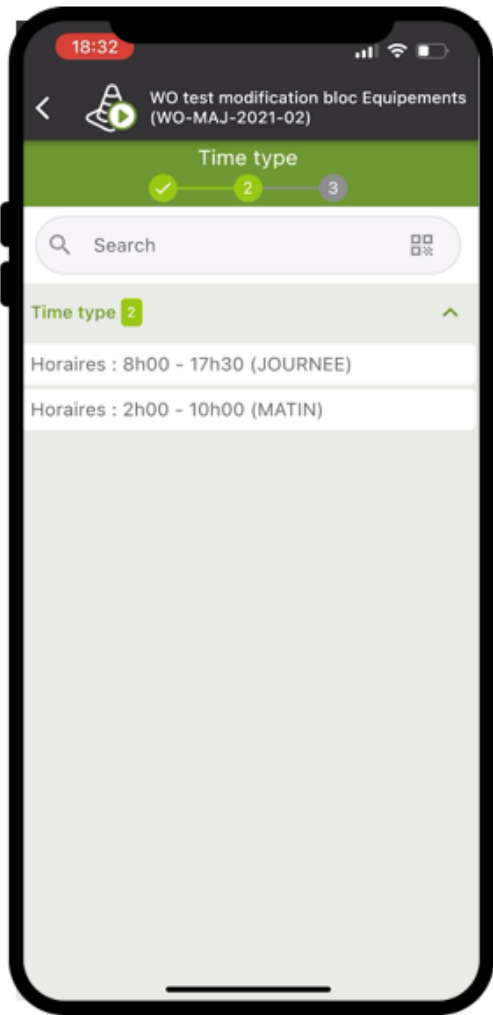
Step 1 displays the list of «Active» material resources. A connection to the CARL Source server is required to initialise this list.



The user must select the desired material resource from the proposed list. CARL Touch then moves to Step 2 of the data entry wizard.

Step 2 – Selecting the time type

Step 2 selects the labor time type of the material resource from the time types defined for the selected material resource.



If the material resource has a default time type or has only one time type, Step 2 is "skipped" and the wizard proceeds directly to Step 3.

Step 3 – Entering the labor time of the material resource

Step 3 enables users to finalise the addition of a labor type.

The user can edit the date and time by selecting the buttons associated with each of these fields.

The user must also enter the labor duration in the same way.

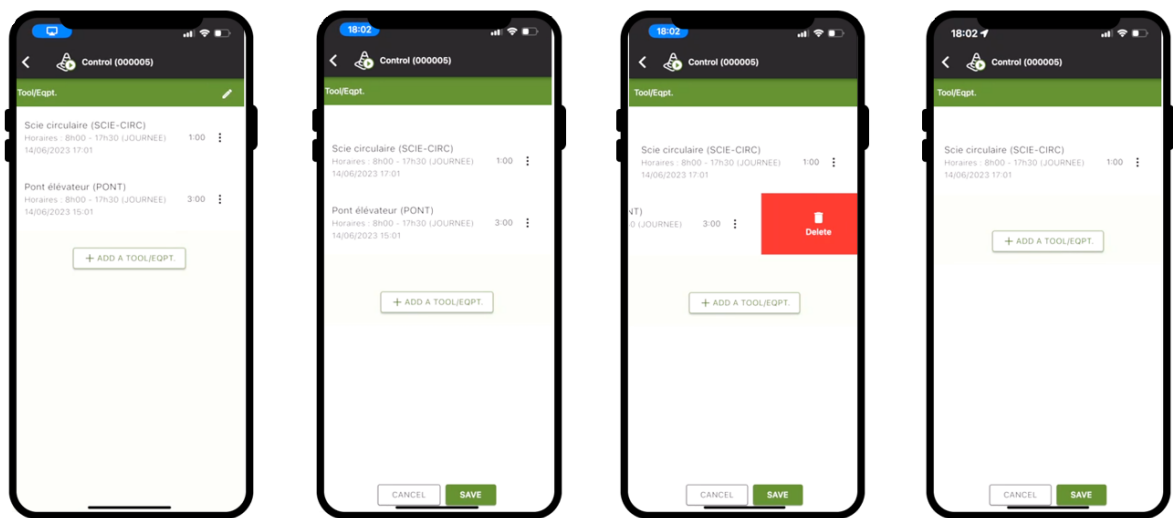
Actions available on the form for this step

The form actions available on this validation screen of a material resource's labor are as follows:

- The **Validate** action is used to add a material resource labor type.
- Clicking on **Cancel** results in the labor data entered being discarded.

• **Deleting a labor type of a material resource**

To delete a labor type of a material resource, users must **edit** the «Material resource» block, then slide to the left the labor line to be deleted and then press the Delete button.



Context-sensitive actions available in material resource labor fields

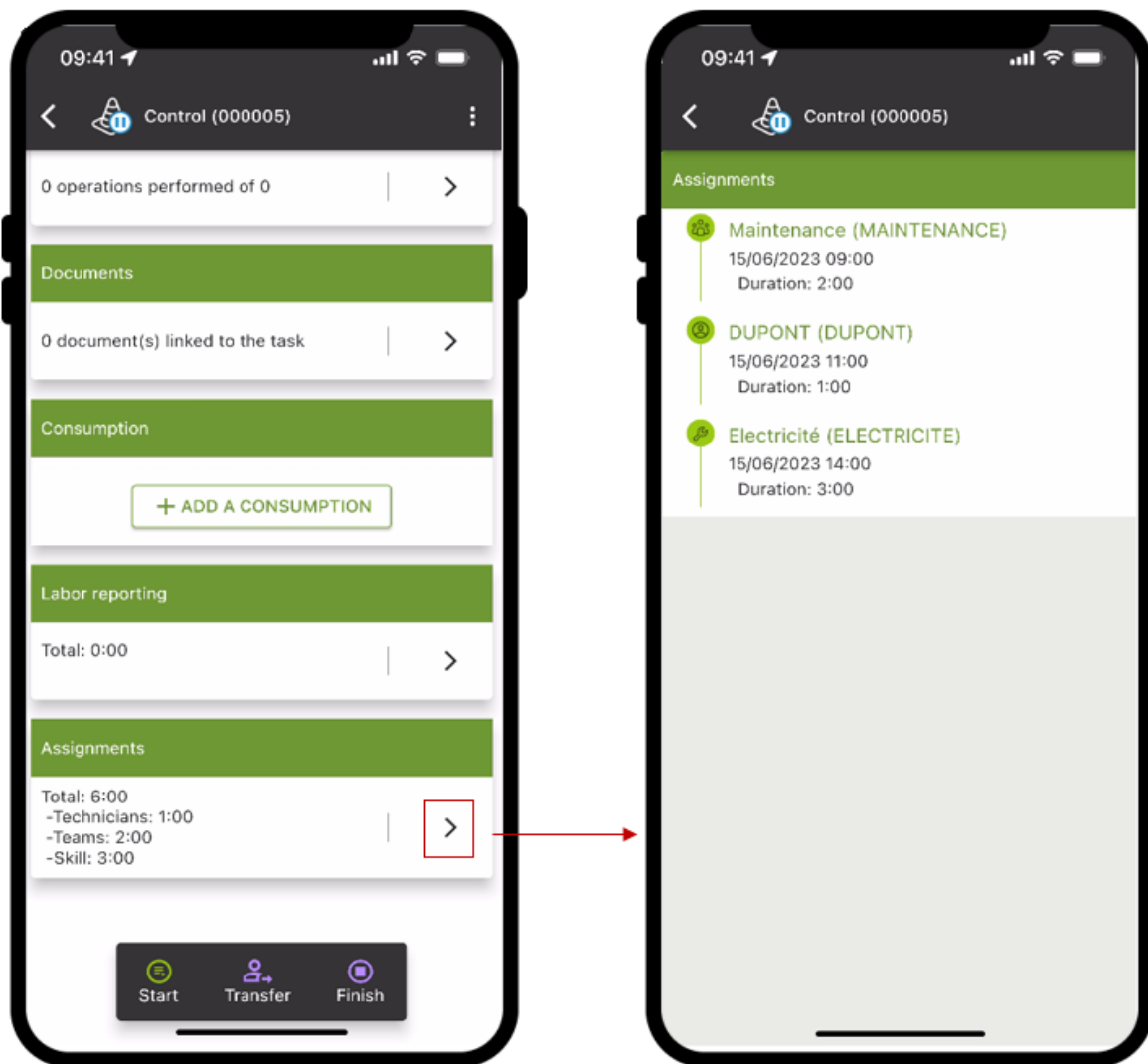
Context-sensitive actions associated with the fields of a material resource labor are accessible via the  button to the right of the field.

Field	Button available	Button action
All fields in the «material resource» block	Copy for another material resource	Copy the current element for another material resource.

7.3.12. «Assignments» block

The «Assignments» block is used to display the assignments entered for a task.

To do so, they must select the «Assignments» block for the task.



From the details of the "Assignments" block, the user can only view the assignments that have been entered in CARL Source.

7.4. Task details – Work request

7.4.1. Presentation

A task may be either a work order or a work request. Work requests have their own form:

7.4.2. Data displayed



The data listed below corresponds to the structure of the «standard» form.

CARL Touch forms are customizable, implying that the form structure may be different in your context.

The WR details form contains the following:

«General» block

- **Priority** of the work request.
- **Acceptance of work** indicator: does work need to be accepted (Yes/No).
- **Desired end date** for the work request.

«Equipment» block

- **Location**: Location point for the work request.
- **Asset** affected by the task.

«Diagnosis» block

- **Failed**: failure indicator (Yes/No).
- **Symptom**.



- The «Person in charge» field is not displayed as default. The WR details form can be customized to display this field.
- In CARL Source, the «Addressee» field on a work request is initialized:

1. Either by the person in charge entered in CARL Touch.
2. Or by the person in charge of the equipment.

"Comment" block

- **Comment.**



Further details about the comment entry mechanism are given in section [Entering and displaying comments](#).

«Documents» block

- **Number of documents relating to the task.**



The  button is used to add/change documents relating to the work request.
Further details about document management are given in section [Managing linked documents](#).

7.4.3. Notifications

When a new work request is stored, CARL Source sends a notification to CARL Touch to inform the user that the work request «CODE-Title» has been stored. The work request then disappears from CARL Touch, because it needs to be addressed in CARL Source:



For a task of WR origin to be accessible again in CARL Touch, the following is required in CARL Source:

- Change it to a status of "Waiting to be taken into account" if the WR was created with a status of "In preparation".
- Change it to a status of "Pending completion" if the WR was created with a status of "Waiting to be taken into account".

7.5. Transfer

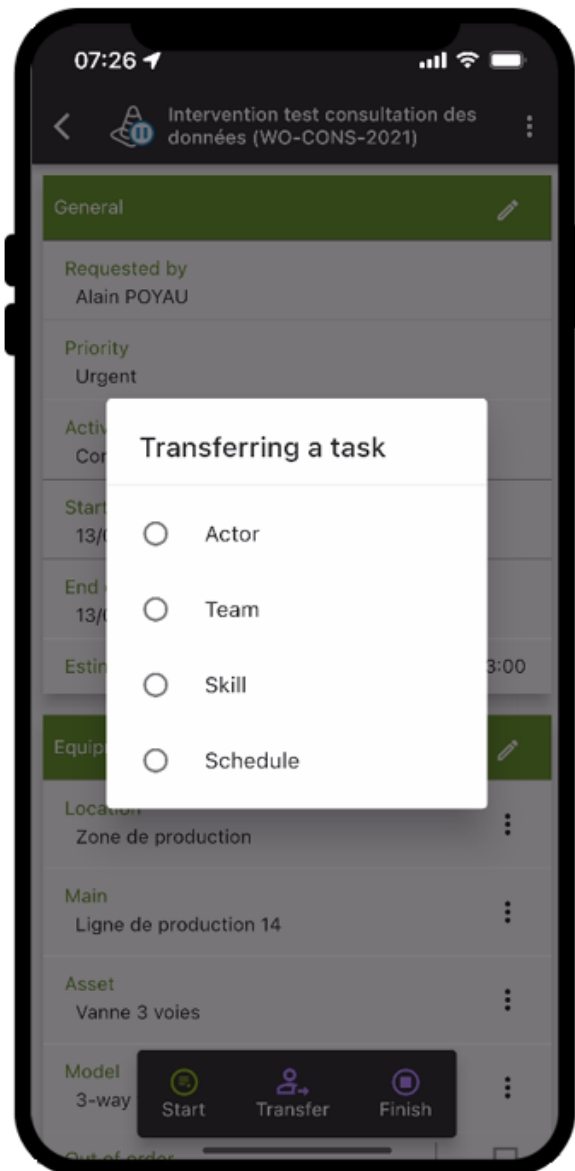
7.5.1. General

This function is subject to a profile right.

As default, users can transfer a task to an **Agent**.

By configuring this transfer action, they can also transfer tasks to:

- A **Skill**.
- A **Team**.
- **Scheduling**: the «To be scheduled» check box will automatically be checked on the corresponding work order in CARL Source.

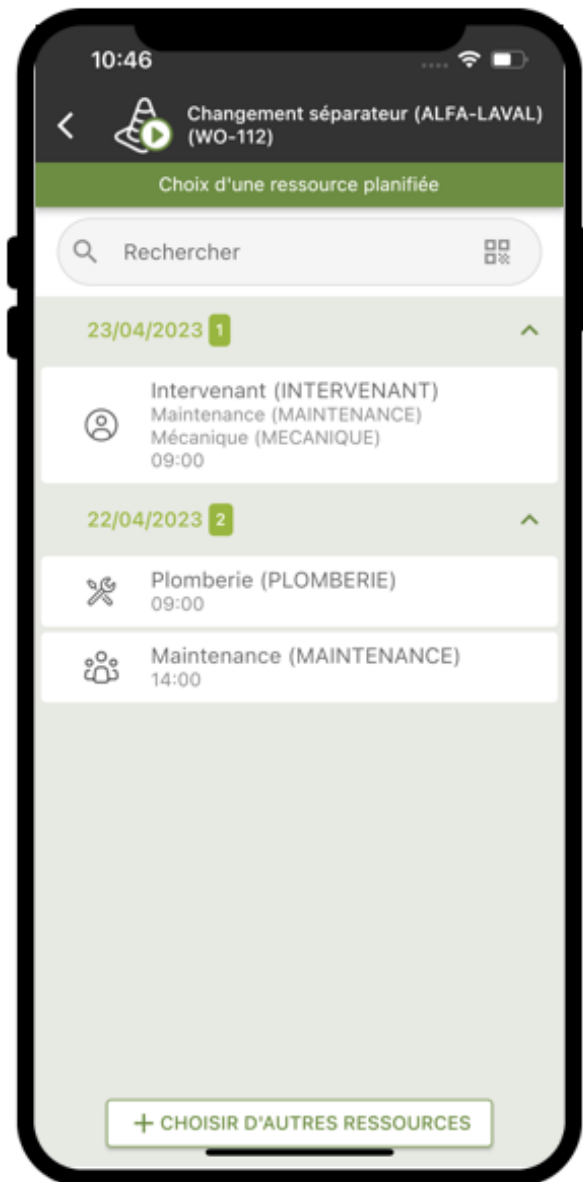


7.5.2. Details

If several transfer types are available, clicking on the [Transfer] button brings up a dialog box for choosing the desired transfer type.

Once the transfer type has been selected, CARL Touch allows the user to select an agent, a team or a skill, and to enter a comment if needed.

If the assignment management module is active, and there are assignments on the task (other than assigned to the logged-in user), an intermediate step is displayed to select the users, teams or specialties assigned to the task.



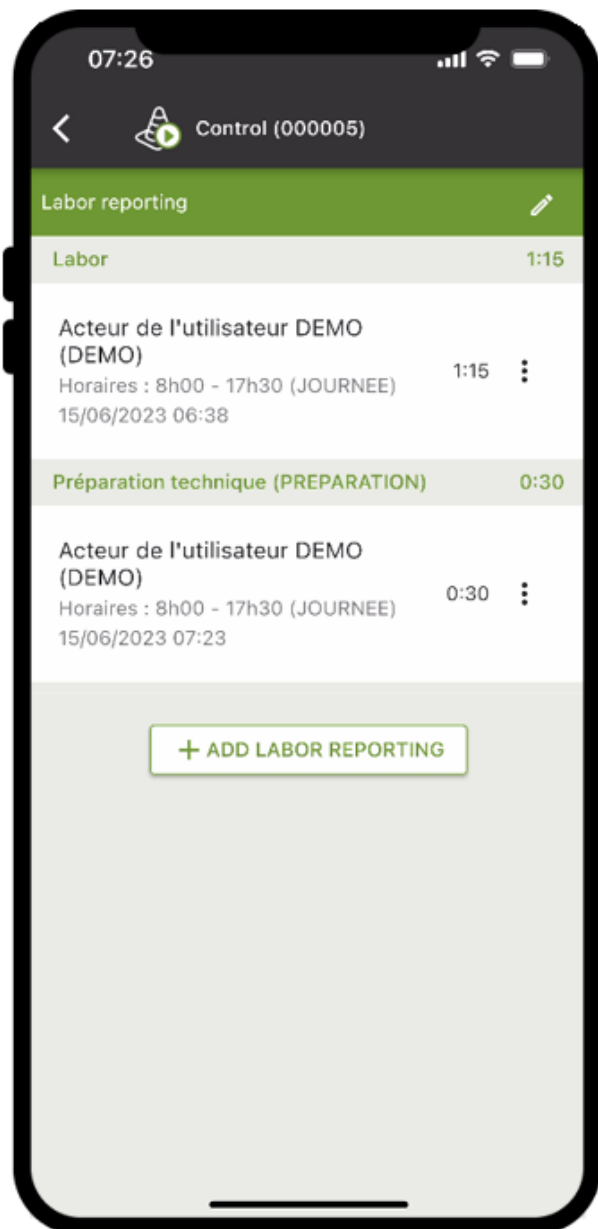
7.6. Activities

7.6.1. General

This function is subject to a profile right.

An activity time (such as travel, for example), distinguished from working time, can be automatically calculated by the application, in order to give details of a task's labor time.

This time is recorded on a task as labor types with a specific nature.



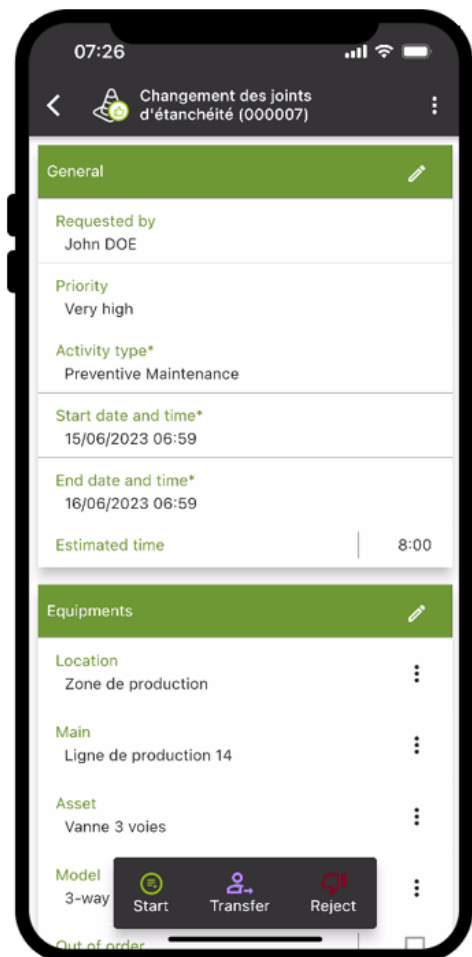
← Labour reporting identified by the occupation Type: PREPARATION

7.6.2. Details

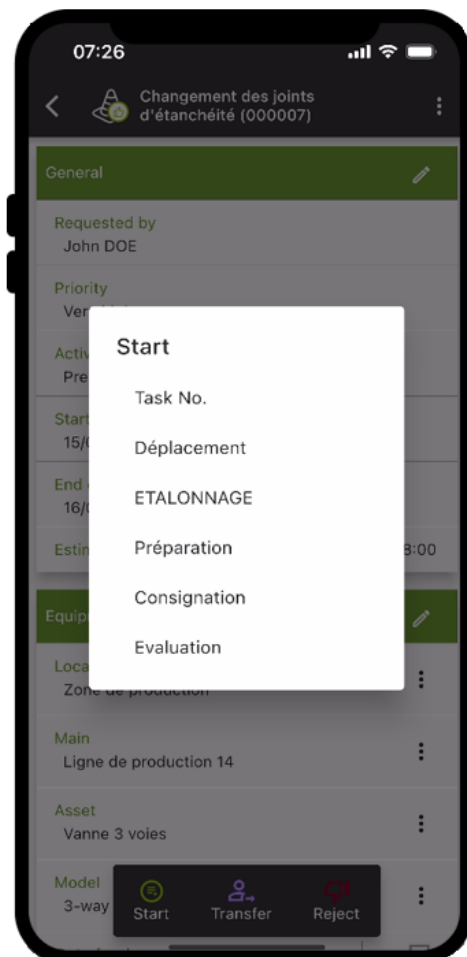
On a task that has been taken into account, the user can report the start of an activity with the "Start" action.

As soon as the user declares the end of the activity with the "Stop" action, a labor type of the selected nature is added to the work order.

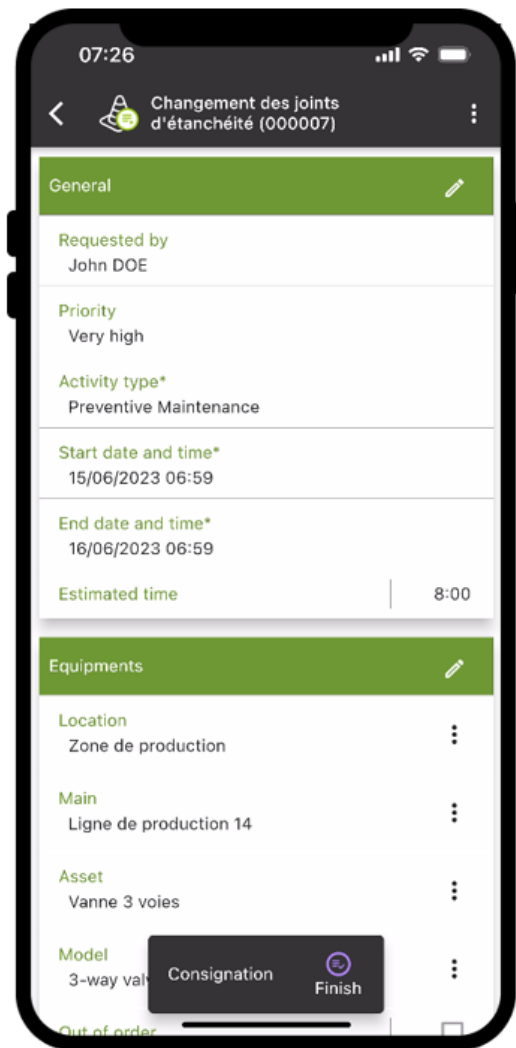
The work order status automatically changes to «Paused».



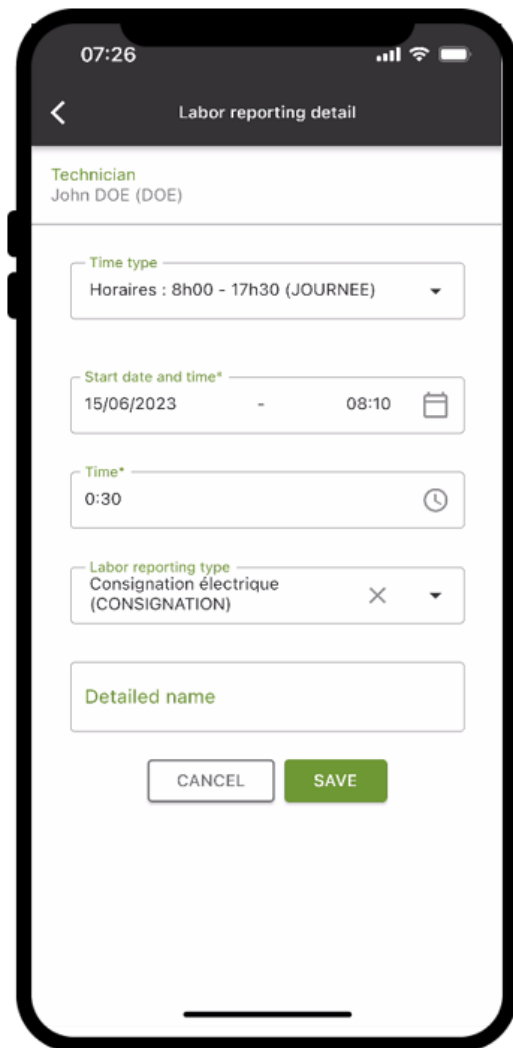
Starting the task or activity



Choice between task or one of the activities

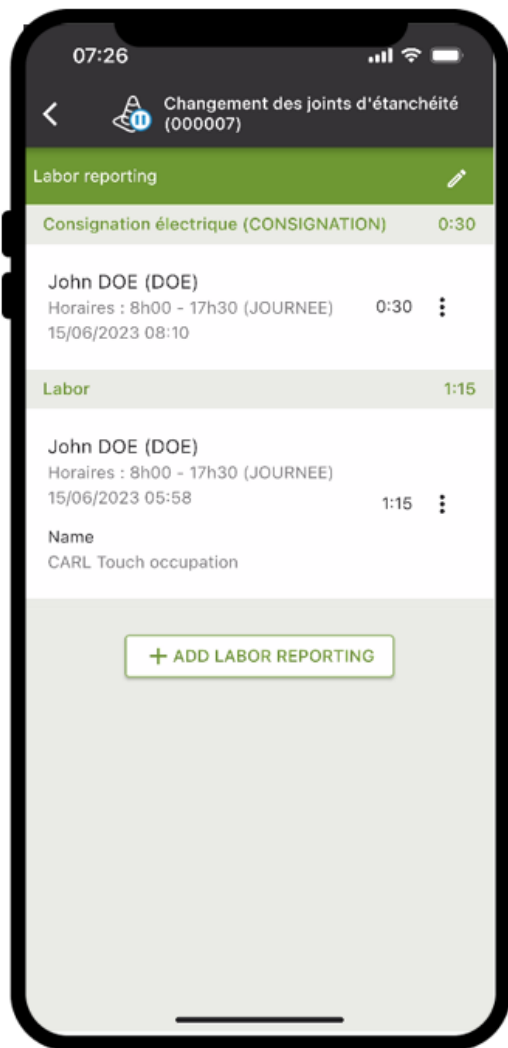


End of the activity



Labour reporting is created with the occupation type selected

A default labor type for each activity may be entered in the configuration of activities.
If labor types are defined, the labor types on a task are presented grouped by nature.



Grouping by occupation type

7.7. Presence checks

7.7.1. General

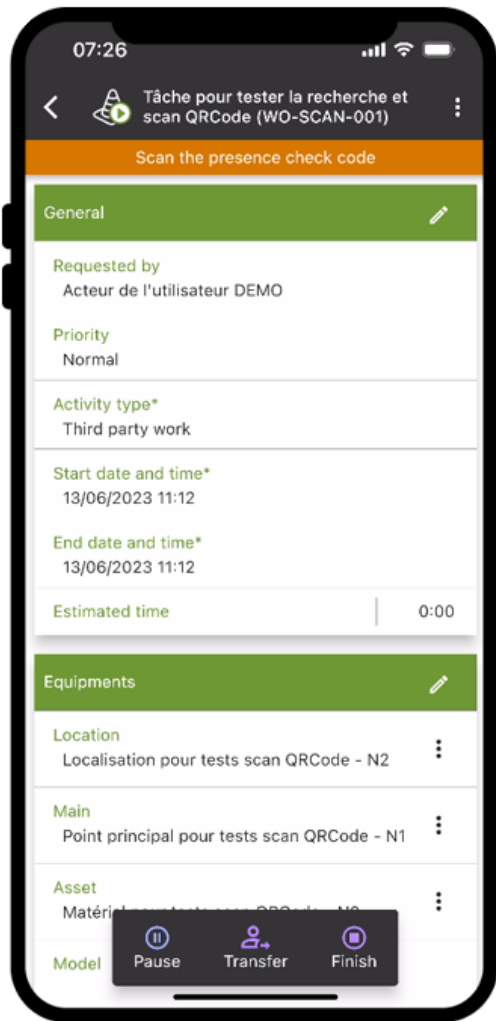
This function, available depending on a profile right, requires users to scan an NFC chip to confirm that they are physically present at the work order location.

Presence checks on a task may be disabled, made possible but optional, or required before a task can be finalized.

7.7.2. Details

A presence check code can be linked to any asset or location and comprises an alphanumeric character string.

On a task that has been started if a presence check code exists for a piece of equipment affected by the task (location point or asset), the application displays an orange bar (at the top of the work order details), requiring the technician to scan a code in order to prove that they were present at the equipment's location.



This presence check code, linked to the work order and to be scanned by the technician when performing the work order, is determined by the server when the work order is created, as follows (by order of priority). It comprises:

- The presence check code for the asset affected by the work order.
- Or the presence check code for the first asset found in the tree structure above the asset being worked on.
- Or the presence check code for the location.
- Or the presence check code for the first location found in the tree structure above the location of the work order.

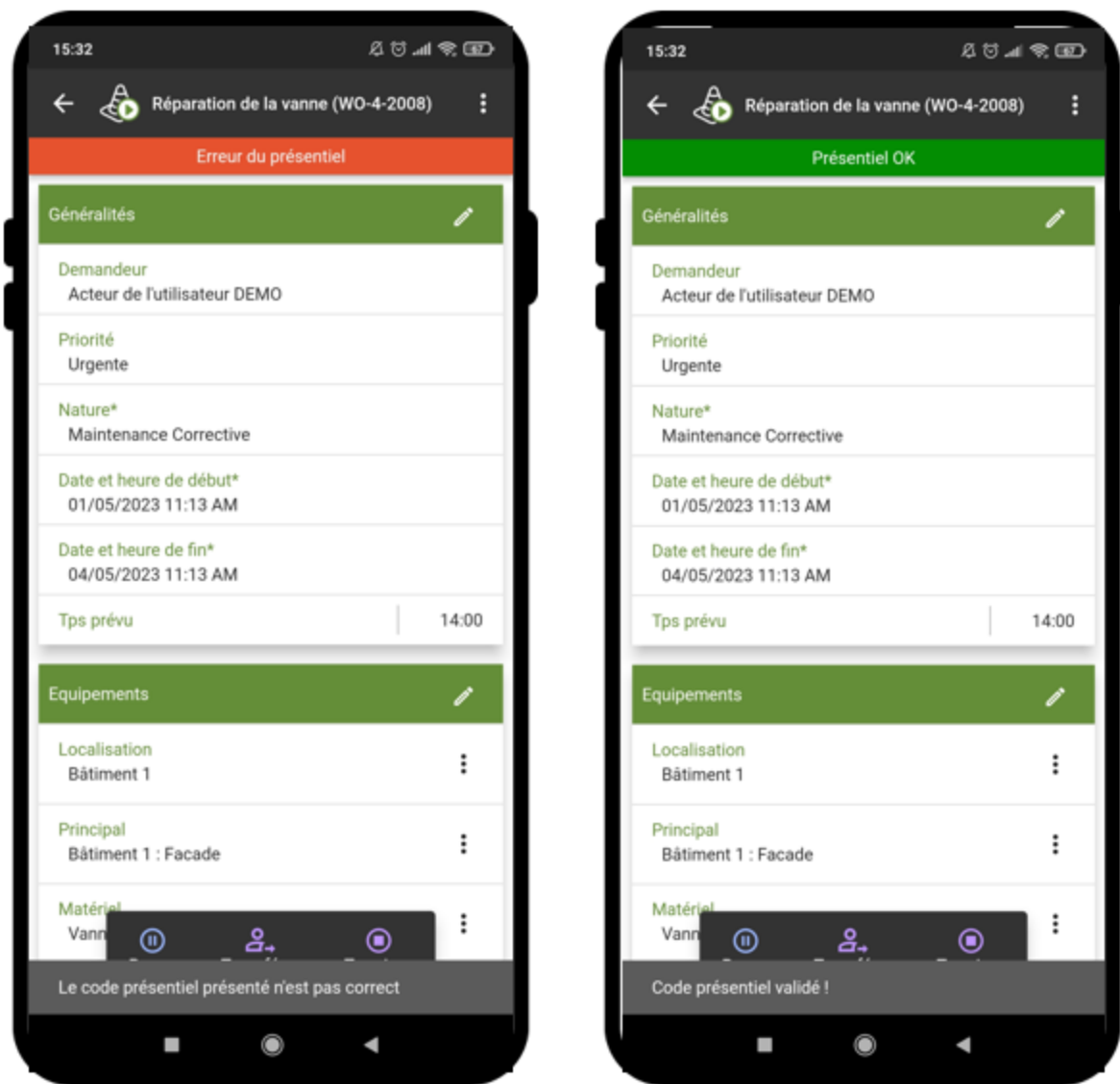
If no presence check codes are found on the equipment affected by the task, the technician is not required to complete a presence check.



If the equipment affected by the work order is changed from CARL Touch, the presence check code is automatically recalculated by the CARL Source server.

If CARL Touch is in offline mode, the presence check code is updated as soon as the device next synchronises with the server.

When the code is scanned, the application determines whether or not the code is correct. If it is incorrect, the user must re-scan the correct code.



7.7.2.1. Optional presence check

The user can scan the NFC chip of the equipment of the work order in progress when the presential scan banner is displayed.

If the code scanned is correct, this is shown in the bar, which turns green before disappearing from the screen.

The task can also be closed without scanning the presence check code.

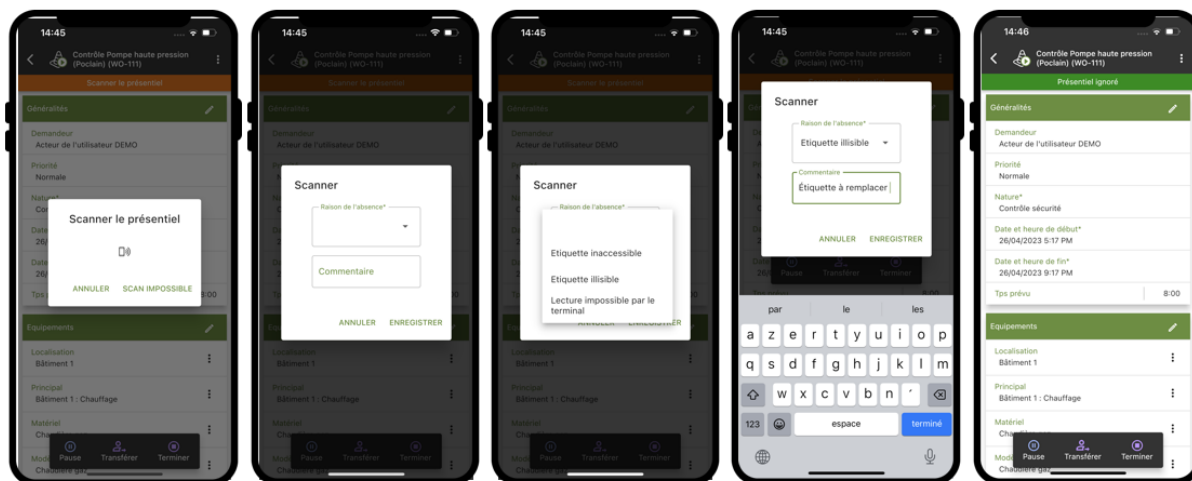
7.7.2.2. Mandatory presence check.

When the presence check bar is displayed, the user can press the button for the QRCode scan and scan the code on the equipment affected by the current work order. If the symbol for the NFC or physical scanner are displayed, the user can (directly from the task detail form), use the physical scanner or bring the smartphone up against the NFC chip on the equipment to be scanned.

If the code scanned matches that expected by the application, this is shown in the bar, which turns green before disappearing from the screen.

The task cannot be closed without scanning the presence check code. If the user is unable to scan the presence check code at the work order location, they can choose to override the check, using a secondary action or the QRCode scan pop-up to state that scanning is impossible.

In this case, a reason and a comment must be entered, so that the lack of proof of presence at the work order site can subsequently be identified.



7.7.2.3. Other actions

At any time, even if the scan has been ignored, the user can request a new scan of a presence check code. If this is done, the bar reappears.

In NFC mode, if the user is on the detail form for a task with a presence check that has already been completed, and the device is brought up against the NFC chip on a piece of equipment, the code is checked again.

7.8. Usage case: Creating a new task

While most tasks initially originate from synchronization with CARL Source, the user can also create new tasks directly from CARL Touch:



1. From the task list, the user clicks on the  icon.
2. The user chooses the task type: Work order, Report or Work request.
3. The task creation form is displayed: the fields comprising the task can be entered directly.

No SIM 13:50

< New task

Name

General

Requested by

Priority

Activity type*
Corrective Maintenance (MAINT-CORR)

Start date and time*
11/24/2021 - 13:50

End date and time*
11/24/2021 - 13:50

Estimated time

CANCEL SAVE



Only fields preceded by a « * » character are mandatory.

4. The creation screen shows two main actions:

Button	Button action
	Cancel creation of a task. If the user confirms the cancellation: the task list is returned to.
	Save the new task. For work orders and work requests: automatic return to the task list. For reports: Display the task details in Started state.

7.9. Usage case: Changing an existing task

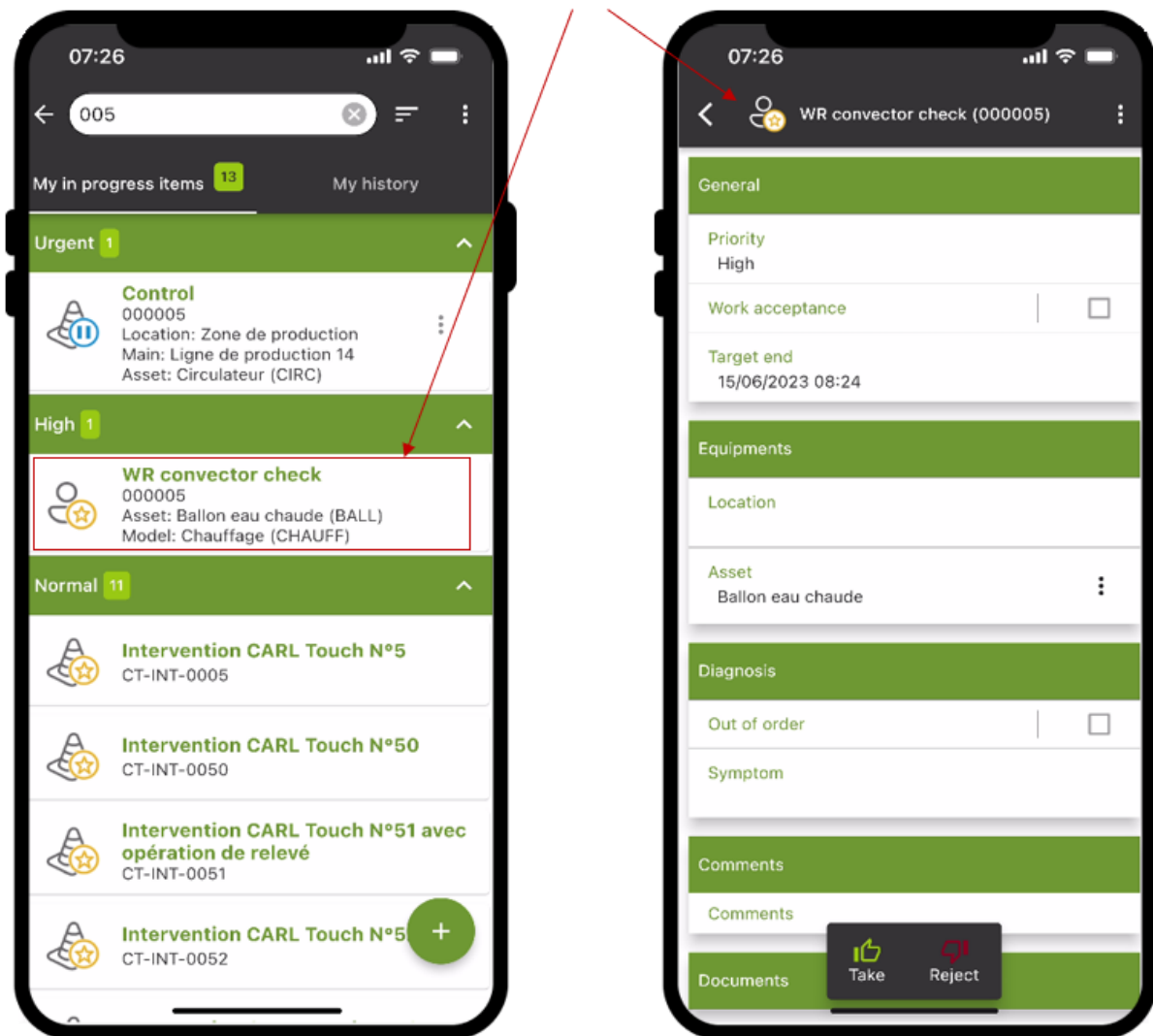
The procedure for changing an existing task depends on the context:

- Task with «Work request» origin
- Task with «Work order» origin

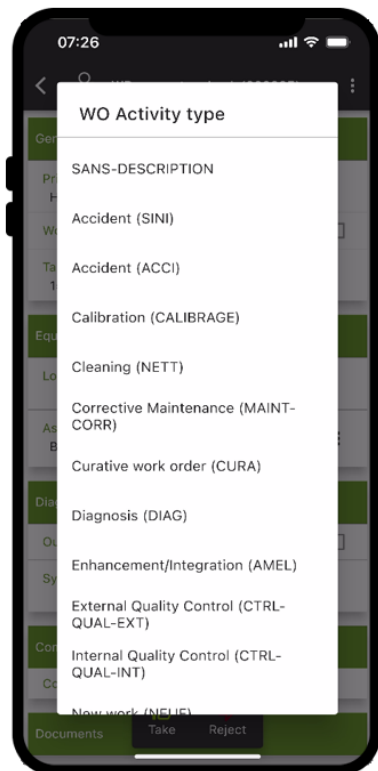
7.9.1. Task with «Work request» origin

1. If the user considers a task with «Work request» origin, the task is identified by the **WR code** (from CARL Source):

WR Code

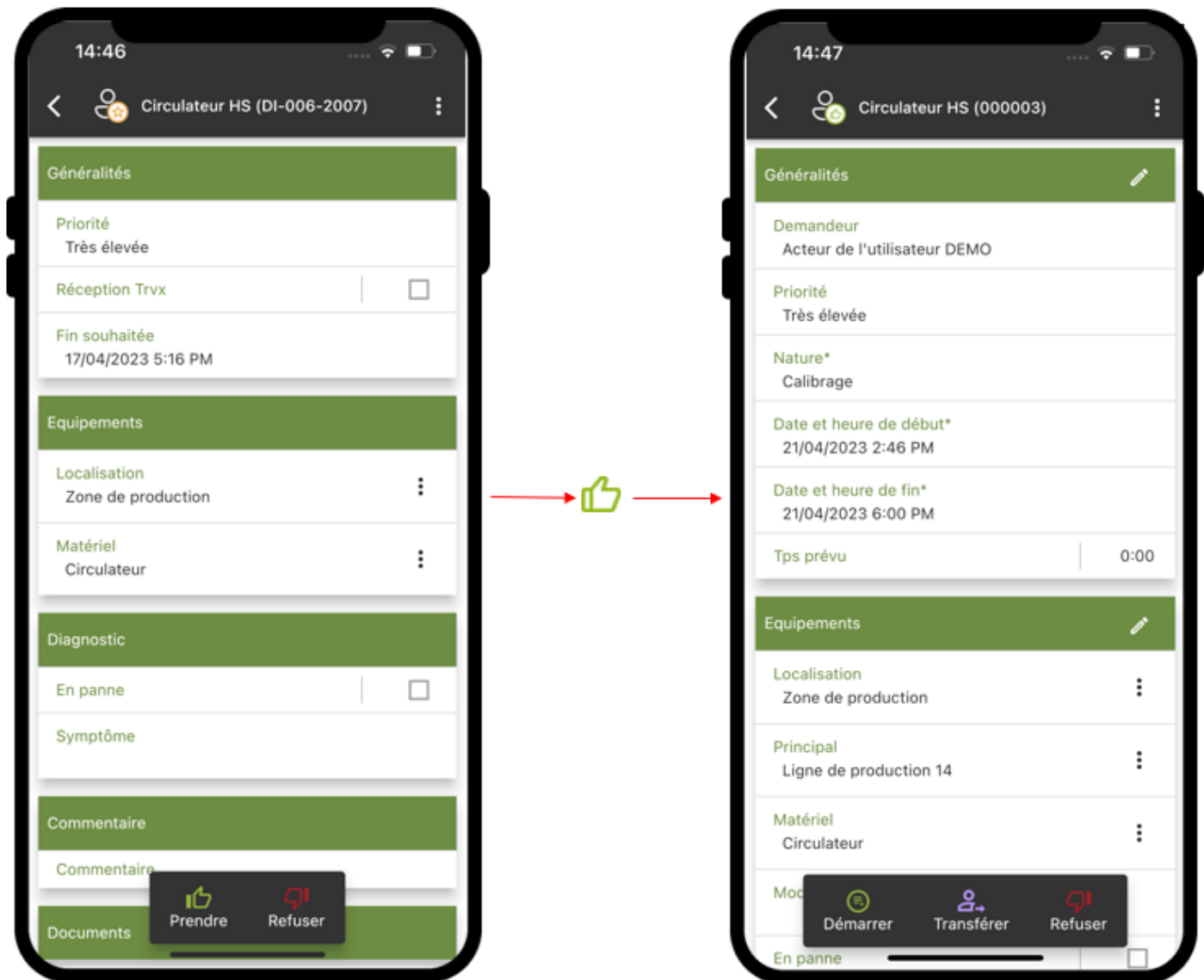


2. When the user takes this task into account via the « **I accept** » action on the task detail form, they are asked to choose a work order type from a list proposed by CARL Touch:



3. Selecting a work order type marks the transition from a «Work request» context to a «Work order» context per se.

This is reflected in CARL Touch by **displaying the «Work order» code** for the task (instead of the «Work request» code previously):



After a task is taken into account, the user can access the following action buttons:

- **"Start"**.
- **"Reject"**.

4. As the user is now dealing with a «Work order», the remainder of the procedure is similar to that described below for a task with Work order origin.

7.9.2. Task with «Work order» origin

1. When the user takes into account a task of «Work order» origin via the «I accept» action on the task detail form, they have access to the following action buttons:

- **"Start"**.
- **"Reject"**.

2. The user chooses to **"Start"** the task: on the CARL Source side, the associated work order changes to the "In progress" status.

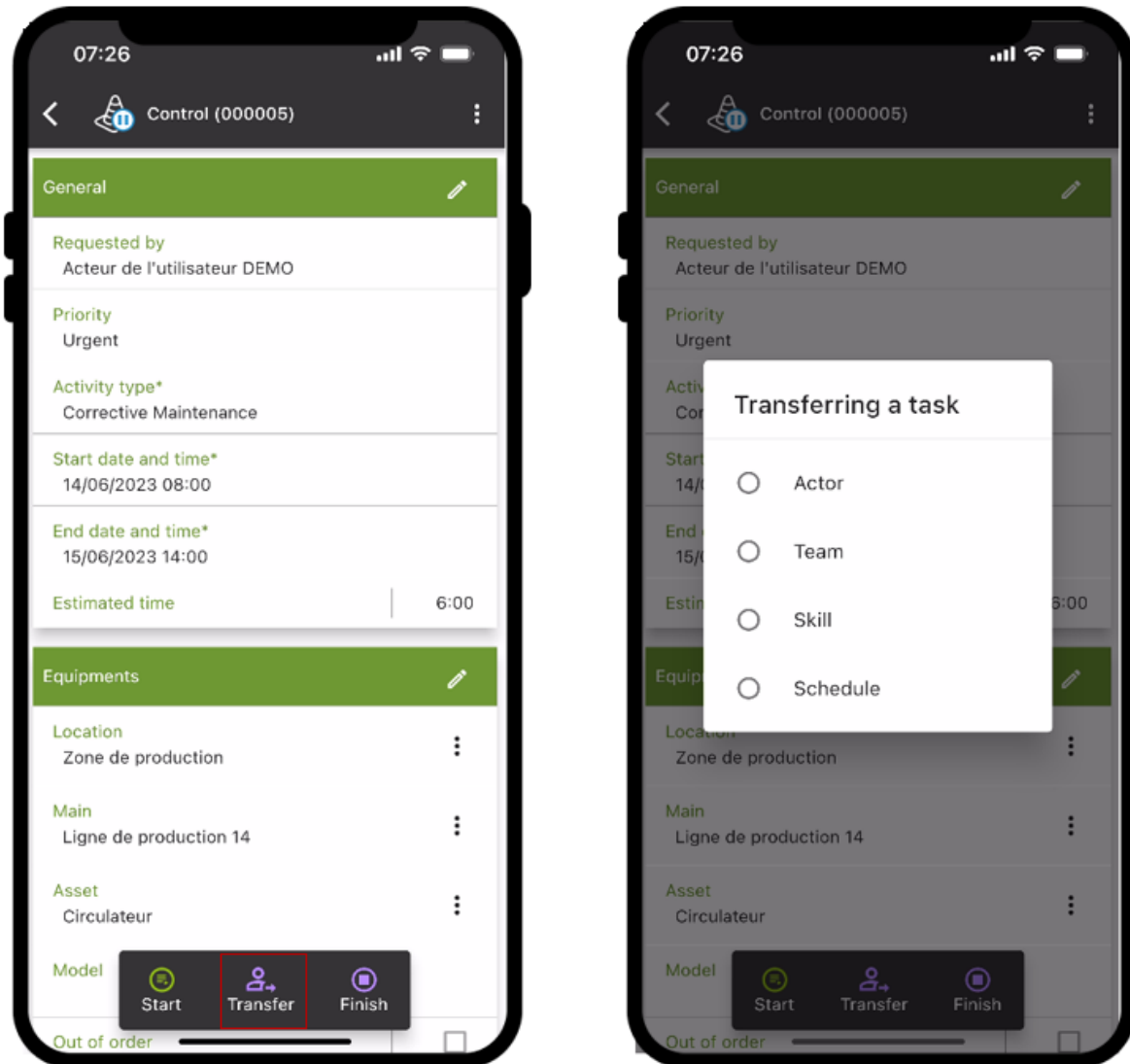
3. Once the task has been started, the user has access to the following actions:

- **"Pause"**.
- **"Finish"**.



The **"Pause"** or **"End"** actions have a direct impact on the **labor types** on the CARL Source side: indeed, these actions automatically generate one or more labor types for the default time type of the technician associated with the current user.

4. If the user chooses to « **Pause** » the task, the status of the associated work order in CARL Source is set to «Paused». To restart the task, the user can click « **Start** » again.
5. If the user chooses to transfer the task to another CARL Touch user, the «Transfer» action must be selected.



=> Once the task has been transferred, it is no longer displayed in the tasks list.

6. If the user selects « **Finish** », the status of the associated work order in CARL Source is set to «Completed» or «Closed» depending on the «Acceptance of work» setting for the work order.



A "Completed" task can no longer be changed via CARL Touch: it can only be restarted via the CARL Source backoffice.

7.10. Rules for distributing tasks between users

When a new work order (or work request) is created in CARL Source, it is dispatched to the CARL Touch users.

The following rules determine which user(s) receive the new task on their mobile device:

When a new work order is created in CARL Source, it is dispatched in the following order of priority *:

- To nobody, when the work order is to be rescheduled.

- To the addressees of the work order assignment: To the « **mobility** » agent or to all agents associated with the **skill** or the **team** defined in the « *AssignedTo* », « *AssignedSkill* » or « *AssignedTeam* » fields of the work order.



*These fields are not displayed in the standard version – to access them, it is necessary to add them to the form through customization. Warning, it is strongly recommended to set them as **non-editable**. They must remain read-only. Otherwise, the **standard processes** of CARL Touch could be rendered **inoperative**.)*

OR if not (i.e. if no « *mobility* » agent, skill or team is specified in the « *Assigned to* » field of the work order):

- To the « *mobility* » agent entered in the « *Person in charge* » field of the work order.

OR if not (i.e. if no « *mobility* » agent, skill or team is specified in the « *Assigned to* » fields of the work order and no mobility manager is specified):

- To scheduled «mobile» resources defined for the work order in the labor tab.

OR if not (i.e. if no «*mobility*» agent, skill or team is specified in the « *Assigned to* » fields of the work order, no mobility manager is specified in the « *Person in charge* » field of the work order, and there are no « *mobility* » agents among the resources scheduled for the work order):

- To « *mobility* » agents whose manager is the «non-mobile» agent in charge of the work order.

OR if not (i.e. if no «*mobility*» agent, skill or team is specified in the « *Assigned to* » fields of the work order, no mobility manager is specified in the « *Person in charge* » field of the work order, and there are no « *mobility* » agents among the resources scheduled for the work order and there is no mobility agent whose manager is the non-mobility agent responsible for the work order):

- If the person in charge of the work order is not assigned to any user, then **the work order will not be assigned to anyone**.
- Otherwise, the work order will be sent to all « *mobile* » agents[red]* whose user profiles allow them to receive unassigned work orders.



** A « *mobility* » agent is an agent that is linked to a user and for which the « *Mobility* » box is checked. We assume here that each user has at least the right to change the work order.*



Initial synchronization:

Two profile settings for the tasks function can be used to exclude work orders that are too late or too early:

- Past task dispatch horizon (Months): Excludes work orders that have been overdue for more than *n* months. This applies to work orders whose **end date** is earlier than the current date - *n* months. The default value is two months. The value of this parameter must be between 0 and 6.
- Future task dispatch horizon (Months): Excludes work orders that are ahead of time by at least *n* months. This applies to work orders whose **start date** is later than the current date + *n* months. The default value is two months. The value of this parameter must be between 0 and 6.

These two settings only have an impact on initial synchronization. Once the initial synchronization has been carried out, a simple change made to any of the fields in these work orders (late or early) will break them down "as they happen" in CARL Touch.

When a new work request is created in CARL Source, it is dispatched in the following order of priority:

- To the « *mobility* » agent specified in the « *Assigned to* » field of the work request.

OR if not (i.e. if no «*mobility*» agent is specified in the «*Assigned to*» field of the work request):

- To the « *mobility* » agent specified in the « *Addressee* » field of the work request.

OR (i.e. if no «*mobility*» agent is specified in the «*Assigned to*» field of the work request and no mobility addressee is specified):

- To the «mobility» agents, set as «WR addressees», whose manager is the «non-mobile» agent to whom the work request is addressed.

OR (*if the addressee is not entered*):

- To all mobility users set as «WR addressees» whose user profile authorises the transmission of non-assigned work requests.

8. ACTIVITY TRACKING FUNCTION

8.1. Purpose

The CARL Touch "Activity tracking" function allows users to see the labor types on a calendar thereby allowing them to edit them or create new ones.

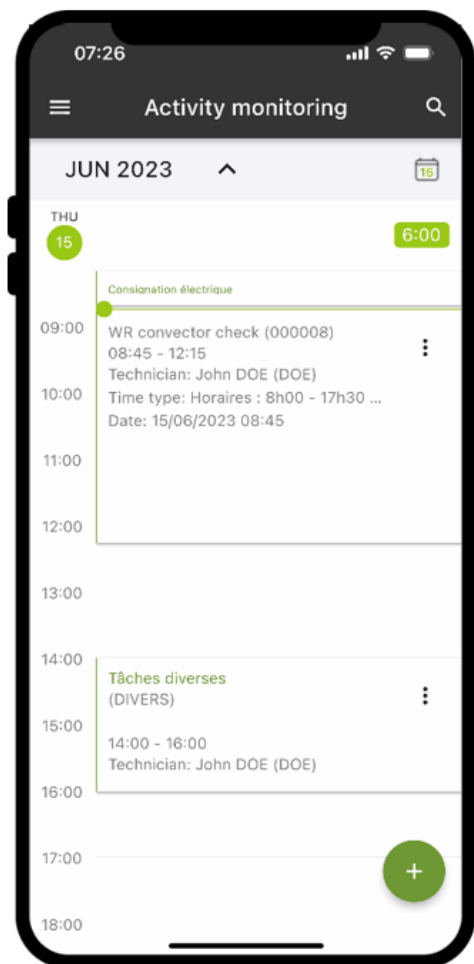
8.2. Activity tracking access rights

General information about activity tracking access rights:

- If the CARL Touch user is a member of a restricted data access group and/or an organizations group, the corresponding consultation and modification rights are applied in CARL Touch.
- Consultation rights are managed in CARL Source.
- Labor modification rights are transferred to CARL Touch, as appropriate for the CARL Touch user.
- Labor deletion rights are transferred to CARL Touch, as appropriate for the CARL Touch user.

8.3. List of labor types

Activity tracking provides a calendar view of the labor types entered for tasks, as well as the labor types for the connected technician.



8.3.1. Data displayed



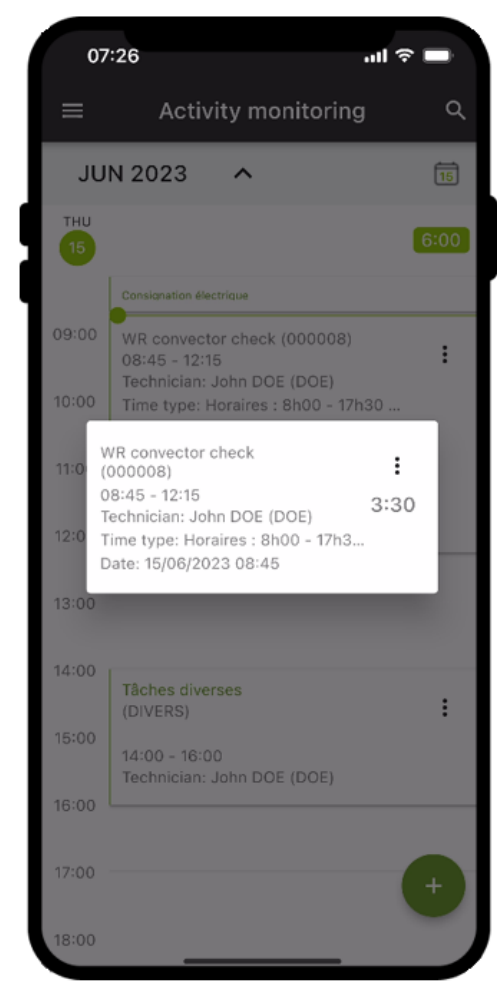
The data listed below corresponds to the structure of the «standard» form.

CARL Touch forms are customizable, implying that of the modal window structure may be different in your user context.

As part of activity tracking, and for each labor type, CARL Touch displays the following data subject to availability (i.e. a line is displayed only if the associated data has been entered) and the space available in the calendar:

- Labor type
- Work order
- Labor start and end time
- Duration of the labor
- Technician
- Time type

When the user presses and holds down the labor type, a modal window is displayed allowing the user to view all the information listed above.



When the user presses briefly on the labor type or on the modal window, the details of the labor type are displayed, allowing the user to view and change the labor type.

8.3.2. Actions

CARL Touch offers general actions for the activity tracking form, as well as task-specific actions.

Actions available on the activity tracking form

Button	Button action
	Search within the list of labor types.

Button	Button action
	Monthly view. The dots allow you to quickly see which days have labor types entered.
	Add a new different labor using the data entry wizard described in «Labor» block

Context-sensitive actions available for a labor type

The context-sensitive actions specific to a labor type are accessible via the button 

Button	Button action
<i>Copy for another technician</i>	Displays the copy wizard of a labor type.
<i>Work order details</i> *	This action displays the task's details.
<i>Edit</i>	Displays the labor details (if the technician has edit rights).
<i>Delete</i>	Deletes the labor (if the technician has delete rights).

* Button available only for work order labor types.

8.4. Labor details

8.4.1. Presentation

The labor details form is described in section «Labor» block.

9. SCHEDULING FUNCTION

9.1. Purpose

CARL Touch's "Scheduling" feature allows users to view scheduled work orders on a calendar:

- For their technician.
- For their specialty.
- For their team.

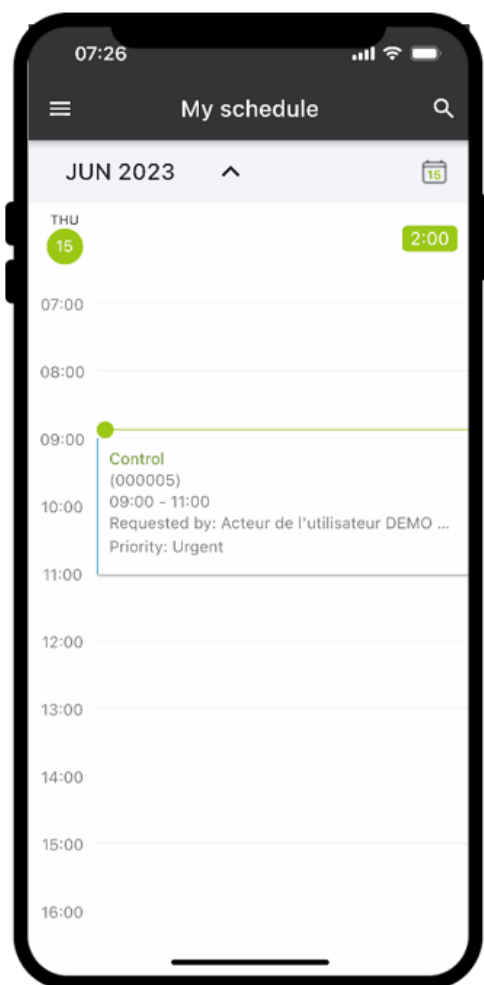
9.2. Access rights to scheduling

General information about access rights to scheduling:

- If the CARL Touch user is a member of a restricted data access group and/or an organizations group, the corresponding consultation rights are checked in CARL Touch.
- Consultation rights are managed in CARL Source.
- Work order change rights are transferred to CARL Touch, as appropriate for the CARL Touch user.

9.3. List of work orders

The scheduling is a calendar view of the scheduled work orders for the connected technician.



9.3.1. Data displayed



The data listed below corresponds to the structure of the «standard» form.

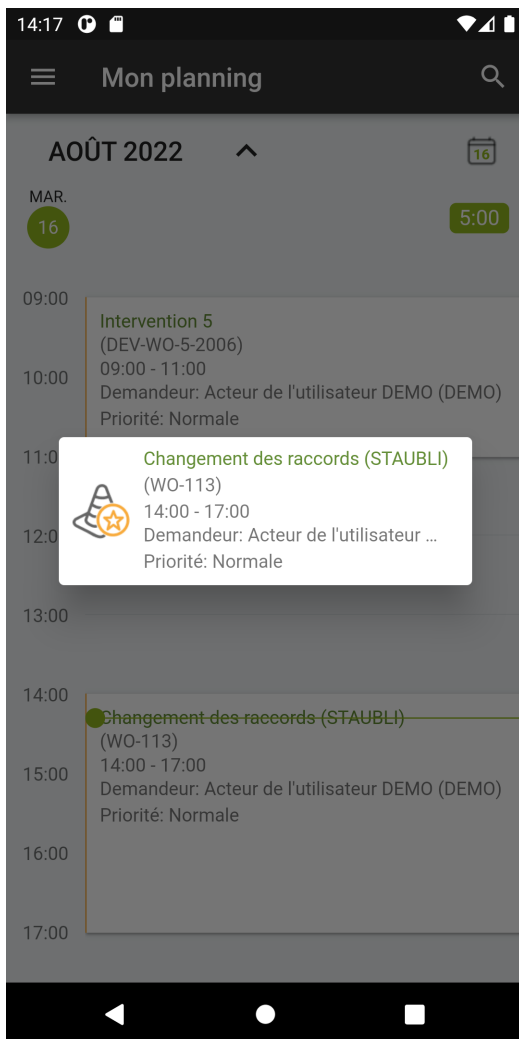
CARL Touch forms are customizable, implying that of the modal window structure may be different in your user

context.

For each work order in the schedule, CARL Touch displays the following data subject to availability (i.e. a line is displayed only if the associated data has been entered) and the space available in the calendar:

- **Work order**
- Scheduling start and end time
- Requested by
- Priority

When the user presses and holds down the work order, a modal window is displayed allowing the user to view all the information listed above.



When the user presses briefly on the work order or on the modal window, the details of the work order are displayed, allowing the user to view and change the work order.

If the work order has already been started by another user, a banner informs the user. The work order will not be able to be changed by the user.




Intervention Coûts Prévus Stock: 5 € (DEV-WO-105)


 La tâche est en cours chez l'intervenant Utilisateur DEMO

Généralités

Demandeur
 Acteur de l'utilisateur DEMO

Priorité
 Normale

9.3.2. Actions

CARL Touch offers general actions for the scheduling form, as well as actions specific to a work order.

Actions available on the scheduling form

Button	Button action
	Search within the list of work orders.
	Monthly view. The dots allow you to quickly view the days when work orders are scheduled.

9.4. Work order details

9.4.1. Presentation

The work order details form is described in section [Task details – Work order](#).

10. ASSETS FUNCTION

10.1. Purpose

The «Assets» function in CARL Touch gives users access to the asset detail form and enables them to consult information such as:

- General information about the asset.
- Equipment links for the asset.
- Characteristics of the asset.
- Documents linked to the asset.
- History of work orders on the asset.

10.2. Access rights to assets

General information about access rights to assets:

- If the CARL Touch user is a member of a restricted data access group and/or an organizations group, the corresponding consultation and modification rights are applied in CARL Touch.
- Consultation rights are managed in CARL Source.
- Asset modification rights are transferred to CARL Touch for each asset, as appropriate for the CARL Touch user.
- An asset is sent to CARL Touch for a given user only if the user has at least the right to consult the asset.
- Deletion: Assets cannot be deleted with CARL Touch.

10.3. List of assets

The list of assets enables users to browse through and consult a set of referenced assets.

10.3.1. Meaning of icons

The various icons that may be found on a list of assets are:

Icon	Meaning
	Asset «Validated».
	Asset «With conflict».
	Asset «Out of order».
	Asset «Being serviced».
	Asset «Scrapped».

10.3.2. Data displayed

For each asset on the list of assets, CARL Touch displays the following data subject to availability (i.e. a line is displayed only if the associated data has been entered):

- Asset **name**.
- Asset **code**.
- Asset **model**.
- Asset **type**.
- Asset **location**.
- Asset **serial number**.
- **Proximity** of the asset relative to the CARL Touch user's smartphone or tablet.
- **Main address** of the asset



If the **Proximity** information appears, the mobile terminal needs to be able to determine its geolocation, and the asset also needs to be geolocated (i.e. have GPS coordinates).

10.3.3. Actions

CARL Touch proposes general actions on the asset list form, as well as asset-specific actions.



If the available actions for a form cannot all be shown directly on the action bar, additional actions are accessible via the button:  .

Actions available on the asset detail form

Button	Button action
	Search within the list of assets.
	Add a new asset.
	Sort the assets.
	Filter the assets – see Assets function for further information about filtering assets.

Context-sensitive actions available for an asset

Context-sensitive actions specific to an asset are accessible via the  button to the right of the asset:



Véhicule société
666CSI69
Modèle: Modèle de véhicules



Button	Button action
NFC pairing	For pairing the selected asset.
RFID Pairing	Enables pairing of selected assets.
Geolocate *	Geolocates the current asset (using GPS).
Display on map *	If the selected asset is geolocated (i.e. has GPS coordinates or an address), this action displays its position on a map.
Tasks in progress	Displays tasks in progress for the selected asset.

Button	Button action
Task history	Displays the history of tasks for the selected asset.
Child equipment	Consults child assets for the selected asset.
Parts list	Displays the individual parts list of the selected asset.
Asset survey	Allows you to start a survey for the selected asset - See Asset survey .
Take a reading	Allows you to take a reading for the selected asset - See Reports .
Entering an event	For entering an event for the selected asset - See Entering an event .
Add to Inventory	Allows you to perform an "Item entry" inventory transaction (if the asset model is a serialized item and the asset is not in stock).
Change Location	Allows you to perform a "Change Location" stock movement (if the asset model is a serialized item and the asset is in stock).
Withdrawal from Stock	Allows you to perform a "Withdrawal" stock movement (if the asset model is a serialized item and the asset is in stock).

10.3.4. Asset list tabs

As default, there are no tabs on the list of assets. However, if a conflict is detected, up to two tabs may be displayed:

- **«ASSETS» tab**: this tab is shown only if the «Conflicts» tab is displayed. It contains the list of assets.
- **«CONFLICTS» tab**: this tab contains assets for which a conflict has been detected.



The conflict display mechanism is described in section [Managing conflicts](#).

Illustration: List of assets when both tabs are displayed



10.4. Asset details

10.4.1. Presentation

The asset details form provides quick, structured access to the information comprising an asset, and enables these fields to be changed if necessary.

10.4.2. Access

An asset's details form can be accessed from the «Assets» function, via the list of assets.

10.4.3. Data displayed



The data listed below corresponds to the structure of the «standard» form. CARL Touch forms are customizable, implying that the form structure may be different in your context.

The asset details form contains the following:

«General» block

- Asset **model**.
- Asset **family**.
- Asset **type**.
- Asset **brand**.
- Asset **serial number**.
- Asset **criticality**.
- **Reference** (Yes/No flag).



When creating an asset, entering the **Model** automatically initialises certain fields on the asset form:

- Name,
- Type
- The characteristics (if specified as "copyable" in the form in CARL Source).

Note that initialization of data from the model is also possible in off-line mode.

«Links» block

- Asset **location**.
- **Main parent** of the asset.
- **Parent asset** of the asset.

«Comments» block

- **Comment**: comment associated with the asset.



Note that the  button is used to add or change the **Comment** field.

Further details about the comment entry mechanism are given in section [Entering and displaying comments](#).

«Characteristics» block

- **Number of characteristics** assigned to the asset.



Note that the  button is used to add or change the list of characteristics.

Further details about characteristics are given in section [«Characteristics» summary block](#).

«Documents» block

- **Number of documents linked to the asset**.



Note that the  button is used to add or change documents relating to the asset.

Further details about document management are given in section [Managing linked documents](#).

10.4.4. Actions

CARL Touch proposes general actions on the asset detail form, as well as actions specific to an asset's fields.

Actions available on the asset detail form (via the  button)

Button	Button action
NFC pairing	For pairing the current asset.
RFID Pairing	Enables the pairing of standard assets.
Geolocate	Geolocates the current asset (using GPS).
Display on map	If the selected element is geolocated (i.e. has GPS coordinates or an address), this action displays its position on a map.
Task history	Displays the task history of the current asset.
Tasks in progress	Displays the tasks in progress for the current asset.
Create a task	Used to create a task on the current asset.
Child equipment	Consults the child assets of the current asset.
Parts list	Displays the individual parts list for the current asset.
Asset survey	Allows you to start a survey for the current asset - See Asset survey .
Take a reading	Allows you to take a reading for measurement or inspection for standard assets - See Reports .
Entering an event	For entering an event for the current asset - See Entering an event .
Add to Inventory	Allows you to perform an "Item entry" inventory transaction (if the asset model is a serialized item and the asset is not in stock).
Change Location	Allows you to perform a "Change Location" stock movement (if the asset model is a serialized item and the asset is in stock).
Withdrawal from Stock	Allows you to perform a "Withdrawal" stock movement (if the asset model is a serialized item and the asset is in stock).

CARL Touch offers specific actions for asset fields.

Context-sensitive actions available for asset fields

Context-sensitive actions specific to asset fields are accessible via the  button to the right of the field.

Field	Button available	Button action
Template	Access to details	Displays the detail screen for the selected model.
	Tasks in progress	Displays the tasks in progress for the selected model.
	Task history	Displays the history of tasks for the selected model.
	Parts list	Displays the individual parts list for the selected model.
Family	Task history	Displays the history of tasks for the selected family.

Field	Button available	Button action
All fields in the «Links» block	Access to details	Displays the detail screen for the selected element.
	NFC pairing	Pairs the selected element.
	Geolocate	Geolocates the current element (using GPS).
	Display on map	If the selected element is geolocated (i.e. has GPS coordinates) or has an address, this action displays its position on a map.
	Tasks in progress	Displays tasks in progress for the selected element.
	Task history	Displays the history of tasks for the selected element.
	Child equipment	Consults child links for the selected element.
	Asset survey	Allows you to start an asset survey for the selected element - See Asset survey .
	Entering an event	For entering an event for the selected element - See Entering an event .
	Parts list	Displays the individual parts list of the selected element (Action only available for the asset field).

10.4.5. «Characteristics» summary block

The characteristics of an asset are managed via the asset detail «Characteristics» block.



Locations and **models** also have a «characteristics» block that **operates on the same principle**.

When an **asset is created**, if it is associated with a model, the **«copyable» characteristics** from the model are **automatically transposed** to the asset.

The user can also **add, change or delete** characteristics on an asset directly from CARL Touch.

When the user clicks on the « *Add characteristic* » button from the characteristics summary screen (accessible via the  button), CARL Touch displays the characteristics selection screen. This screen has two tabs: the available characteristics list and the available characteristics sheets. It is important to note that:

- The characteristics list and characteristics sheets is **available off-line** (it is downloaded when the mobile device data is initialized).
- The list of characteristics enables **multiple characteristics to be selected**: the user can select one or more characteristics from the list – the selected characteristics will be automatically retrieved when the screen is confirmed.
- The characteristics sheets list allows the **selection of a characteristics sheet**: the user can select a characteristics sheet with one or more characteristics. The characteristics associated with the characteristics sheet will be automatically retrieved when the screen is confirmed, together with any initialization values.



CODE domain characteristics are not managed in CARL Touch.

Adding a characteristic to an existing asset

1. The user is on the detail form for an asset: the "Characteristics" summary block indicates: "*0 characteristic(s) associated with the asset*".

The user then clicks on the  icon at the right of the summary block.

2. The characteristics summary screen is displayed. The user clicks on the « *Add a characteristic* » button.

3. The list of available characteristics is displayed: the user selects a characteristic (e.g. «Purchase price») and confirms this choice.

4. On returning to the summary screen, the new characteristic is displayed but does not yet have a value.
5. The user clicks on the characteristic itself.
6. A window allows users to enter the value they want to save: the user enters a value and confirms with 'OK'.
7. On returning to the summary screen, the characteristic now has the value entered in the previous step.

Deleting a characteristic

1. Switch to change mode on the «Characteristics» block using the following icon. .

2. Slide the line of the desired characteristic to the left.

3. Delete the characteristic by selecting the associated  icon.

10.4.6. Entering an event

It is possible to declare a symptom for an equipment item using the "Enter an event" action.

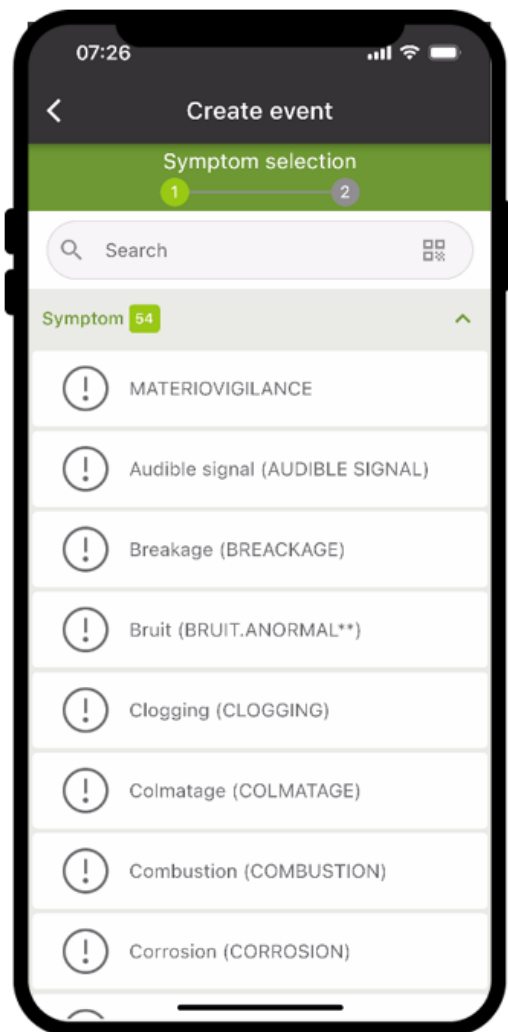
This action is available from the detail form of an equipment item via the  button or from the context-sensitive actions of an

 equipment field via the  button.

Selecting this action starts a two-step wizard:

Step 1 - Choosing the symptom.

This step allows users to choose a symptom code.



CARL Touch will initially show the user the symptoms from the troubleshooting assistance for the asset specified on the task, or the model specified on the task if there is no failure tree for the asset.

If neither the asset nor the model have troubleshooting assistance, CARL Touch will directly show the full list of symptoms.

Step 2 - Event.

This step allows users to complete the entry.

This step presents the following data:

- **Equipment:** Code and name of the selected equipment (this field cannot be changed).
- **Symptom:** Code and name of the symptom selected in step 1 (this field cannot be changed)
- **Date** and time when the event is declared.
- **Comment** associated with the event.

07:26

< Create event

Event

✓ 2

Equipment
Sprinkler-eau (SPRINK_03)

Symptom
Clogging (CLOGGING)

Start date and time*
15/06/2023 - 08:49

Comments

CANCEL SAVE



Upon confirmation of the entry, the data is saved and sent to CARL Source. There is no function in CARL Touch allowing events to be viewed.

10.5. Assets filter

The "Filter" feature is available by clicking on the [\[../../resources/images/CXT-AA/Filter.png\]](#).

Selecting this action opens a **Filter form**, displaying the search criteria specific to the "Asset" feature.

07:26

Asset filter RESET

Type ⚙️

Serial number

Model ⚙️

Brand ⚙️

Warranty type ⚙️

Min Last inventory 📅

Max Last inventory 📅

Location ⚙️

Manager ⚙️

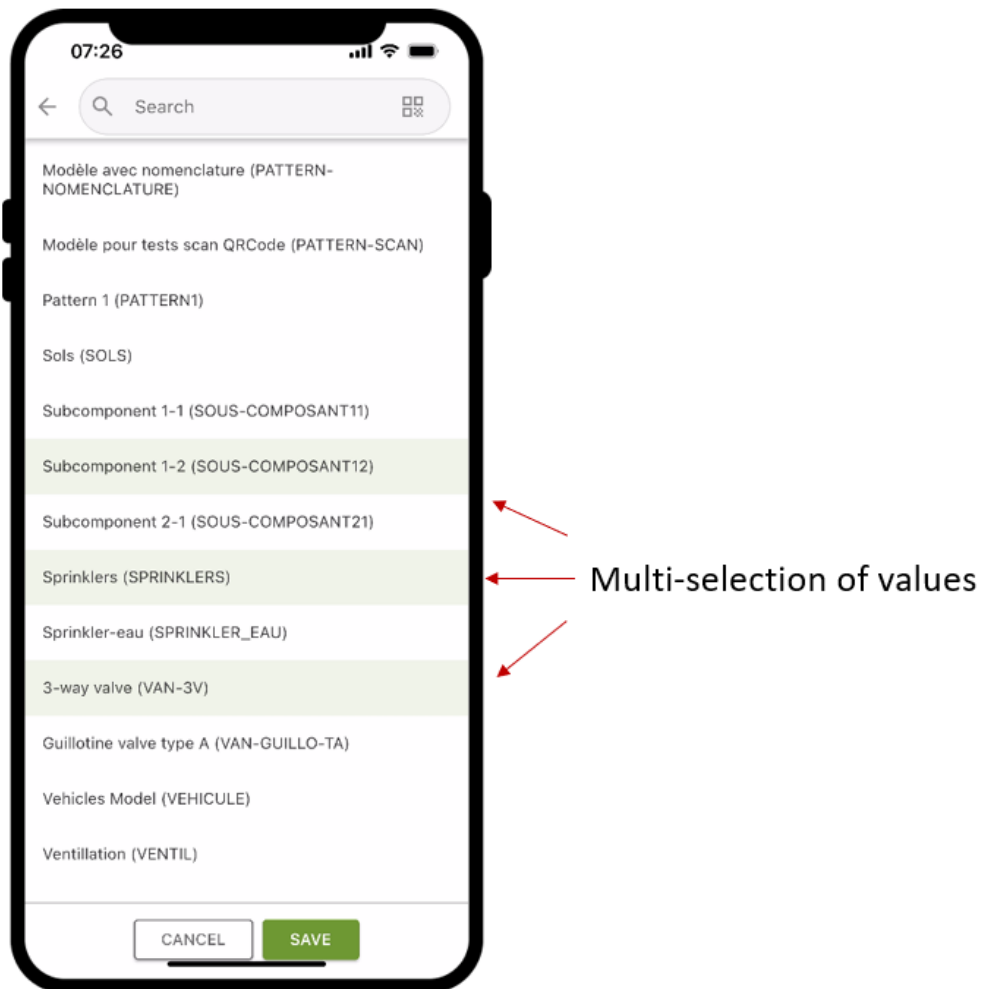
CANCEL SAVE



This form can be customized via the "Search for Assets" form.

The assets filter has the following specific features:

- Search criteria relating to attributes associated with values lists enable **a search based on several values**.
- Values can be selected from a list by **multiple selection**:



When the selection is confirmed, the values selected by the user are displayed.

If users want to delete a value, they can press the  icon:

The « **Save** » button is used to initiate a search based on the sort criteria and return to the asset list form.

The information bar displays the criteria that have been entered as well as the number of values entered for each.

Only two operations can reset the filter:

- Pressing the « **Reset** » button (see above).
- **Reinitializing the data** of the CARL Touch application.

10.6. Usage case: Creating an asset

While most assets initially originate from synchronization with CARL Source, the user can also create new assets directly from CARL Touch:

1. From the asset list, the user clicks on the  icon.

2. The asset creation form is displayed: the fields comprising of the asset can be entered directly.




Only fields preceded by a « * » character are mandatory.



3. The button, to the right of the « *Asset code* » field,  can be used to **scan** a bar code or QR Code using the mobile device's camera: the code scanned is then automatically inserted into the « *Asset code* » field, avoiding the need to type it in manually. This function is particularly useful when entering new assets which are **already identified** with barcodes or QR Codes (e.g. on identification labels).

4. When creating an asset, **entering a « Model » automatically initialises certain fields** on the asset form: the model name, type and characteristics (if these are specified as «copyable» in the model in CARL Source).



This initialization of data from the filled in model is **also possible in off-line mode**.

5. The creation screen shows two main actions:

Button	Button action
	Cancel the creation of an asset. If the user confirms the cancellation: the list of assets is returned to.
	Save the new asset. Automatic return to the assets list: the asset created can be seen immediately in the list.  the status of a newly created asset (e.g. «Validated») is determined by a profile setting in CARL Source (« <i>Status of assets being created</i> »).

11. ASSET SURVEY

11.1. Purpose

CARL Touch's "Asset survey" function allows the user to carry out an equipment survey based on a location or a main point. It is presented in the form of a wizard that guides users step-by-step through the asset survey process.

The asset survey is also accessible from an asset's details, a location or a main point.

11.2. Access

This sub-function can be accessed:

- directly from the navigation menu (« *Asset survey* »).
- or via the "*Location*" function (selection of the "*Asset survey*" action),
- or via the "*Main points*" function (selection of the "*Asset survey*" action),
- or via the "*Assets*" function (selection of the "*Asset survey*" action),

11.3. Step '1' – Equipment to be inventoried

11.3.1. Presentation

This step allows users to select the equipment to be inventoried.

11.3.2. Data displayed

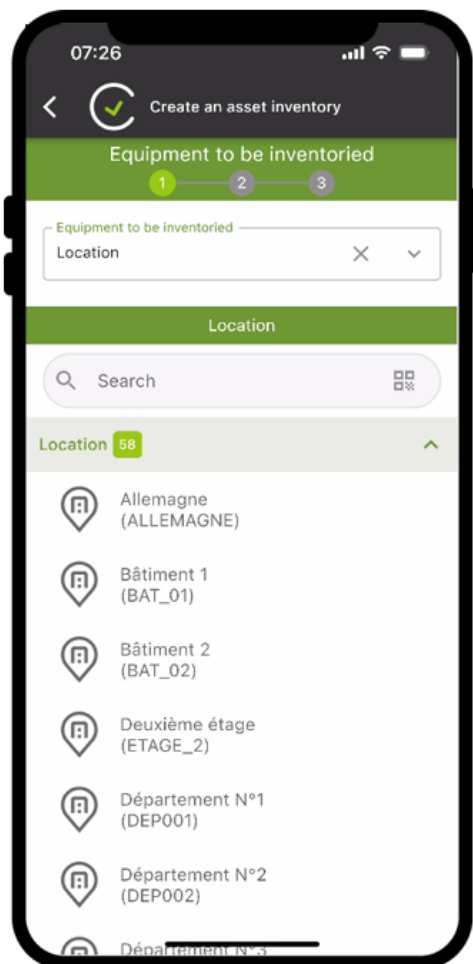
This step presents a values list field allowing you to select the type of equipment to be inventoried:

- Location
- Main point
- Asset

After selecting the equipment type, the equipment list is updated.

Each line of this list presents the following information:

- **Name and code of the equipment** to be inventoried.



11.3.3. Actions

Next step in the wizard

- The wizard **moves on to the next step** once a **device has been selected** from the list.

11.4. Step '2' – Details of the equipment to be inventoried

11.4.1. Presentation

This step allows the user to make a cross-selection between the device selected in the first step and a second device.

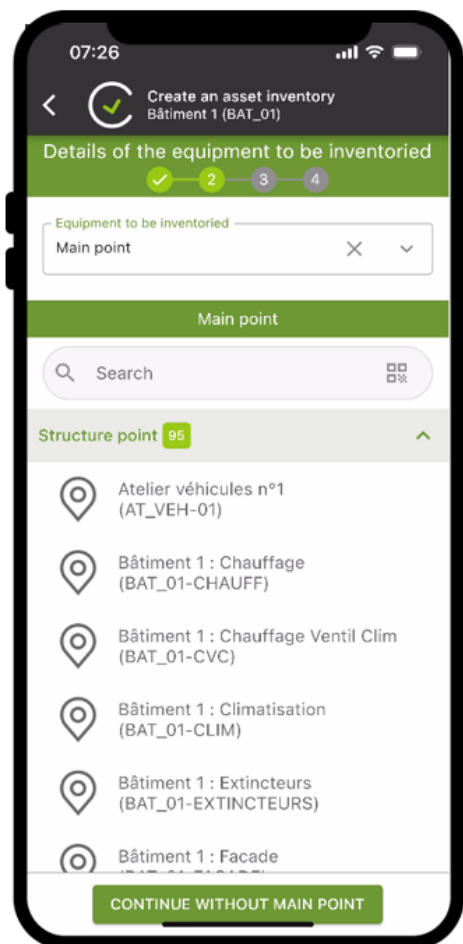
11.4.2. Data displayed

This step presents a values list field allowing you to select the type of equipment to be inventoried. The equipment type selected in step 1 is no longer selectable.

After selecting the equipment type, the equipment list is updated.

Each line of this list presents the following information:

- **Name and code of the equipment** to be inventoried.



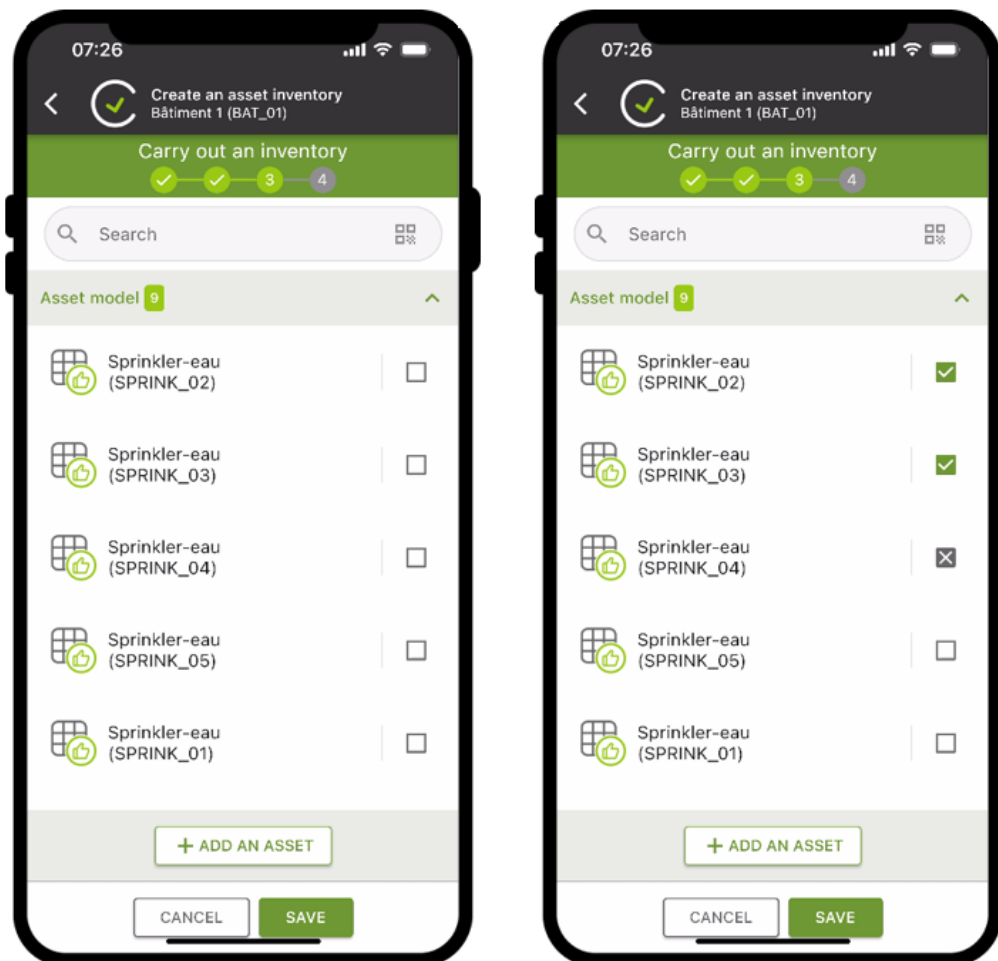
11.4.3. Actions

Next step in the wizard

- The wizard **moves on to the next step** once a **device has been selected** from the list.
- If the **Continue without** button is pressed the equipment type selected, the Wizard **goes on to the next step** without selecting a second filter criterion for assets.

11.5. Step '3' – Carry out the survey

Selecting one or two devices allows you to make a cross-selection to initialize the list of assets to be surveyed.



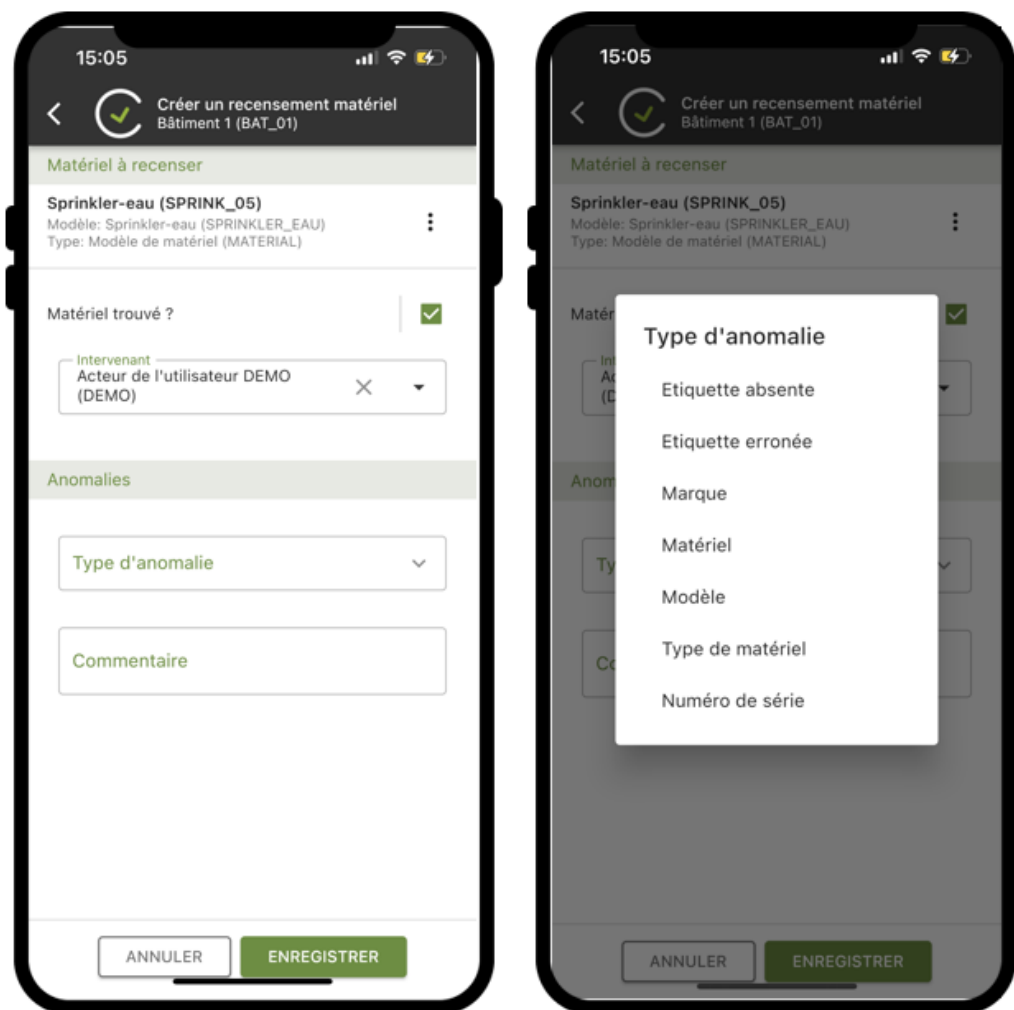
The data displayed on this list is as follows:

- **Name and code of the asset** to be surveyed.

The user can:

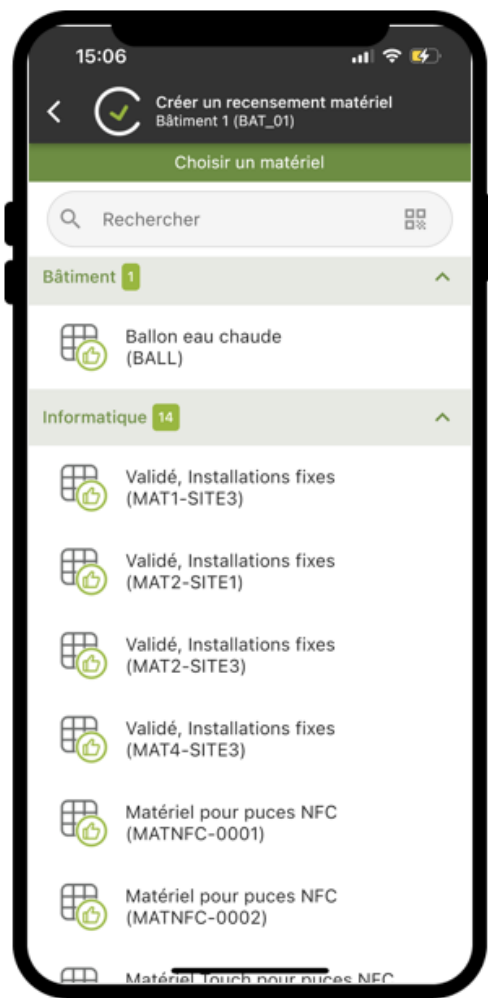
- Confirm the presence of a device by the presence of a tick
- Invalidate the presence of a device by the presence of a cross (by clicking twice on the checkbox)
- Not indicate anything for the device. This will have no impact on the saving of the survey.

By clicking on the asset line, users can view the details of the survey line and declare a problem if necessary.



The "Add an asset" button allows you to list a new asset in the equipment selected in the first step.





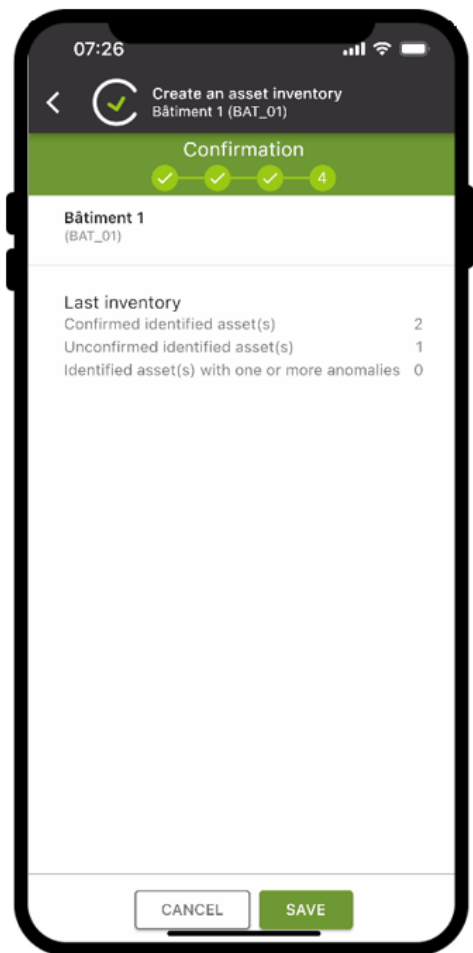
11.5.1. Actions

Next step in the wizard

- When the **Save** button is pressed, the wizard **goes on to the next step**.

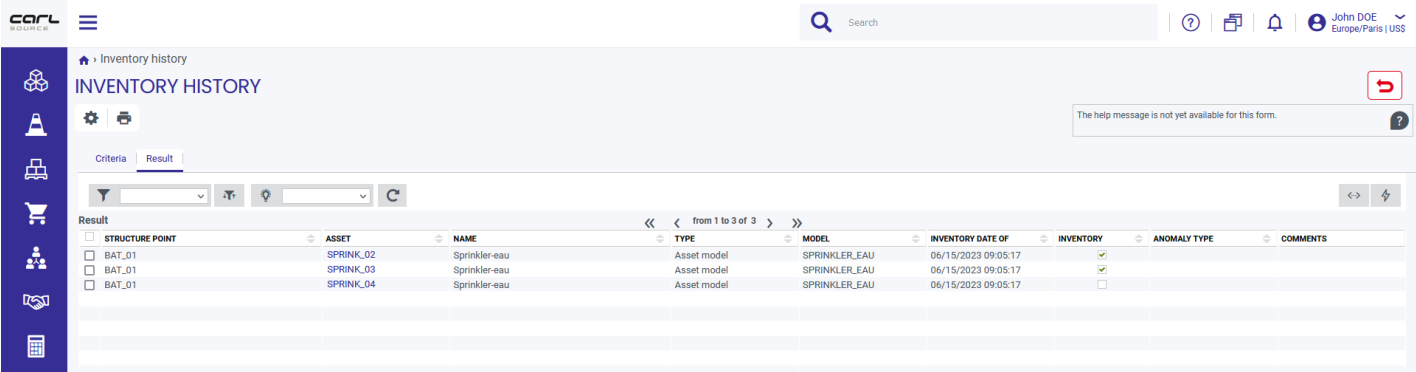
11.6. Step '4' – Confirmation

To finalize the survey, users must **Save** the asset survey report.



Saving the survey lines updates the parent equipment links in CARL Source. The asset’s last inventory date is also updated.

Once the survey is saved, the history can be viewed in the CARL Source "Survey history".



12. LOCATIONS FUNCTION

12.1. Purpose

A **location** in CARL Touch represents a **location structure point**.

The «Locations» function enables users to view the information for these structure points, including:

- General information.
- Information relating to «Surfaces».
- Documents relating to a given location.

12.2. List of locations

The list form displays various information about location points.

12.2.1. Meaning of icons

The various icons that may be found on the list of locations are:

Icon	Meaning
	Location «Validated».
	Location «With conflict».

12.2.2. Data displayed

For each location on the location list, CARL Touch displays the following data subject to availability (i.e. a line is displayed only if the associated data has been entered):

- Location **name**.
- Location **code**.
- Location **type**.
- Location **organization**.

12.2.3. Actions

CARL Touch proposes general actions on the location list form, as well as location-specific actions.

	If the available actions for a form cannot all be shown directly on the action bar, additional actions are accessible via the button:  .
---	---

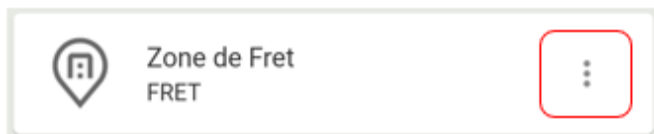
Actions available on the location list form

Button	Button action
	Search within the list of locations.
	Add a new location.

Button	Button action
	Sort the locations.

Context-sensitive actions available for a location

Context-sensitive actions specific to a location are accessible via the  button to the right of the location:



Button	Button action
NFC pairing	For pairing the selected location.
Geolocate	Geolocates the current location (using GPS).
Display on map	If the selected location is geolocated (i.e. has GPS coordinates or an address), this action displays its position on a map.
Tasks in progress	Displays the tasks in progress of the selected location.
Task history	Displays the history of tasks for the selected location.
Child equipment	For consulting locations, main points, and child assets for the selected location.
Asset survey	Allows you to start a survey for the selected location - See Asset survey .
Take a reading	Allows you to take a reading for the selected location - See Reports .
Entering an event	For entering an event for the selected location - See Entering an event .

12.2.4. Location list tabs

As default, there are no tabs on the list of locations. However, if a conflict is detected, up to two tabs may be displayed:

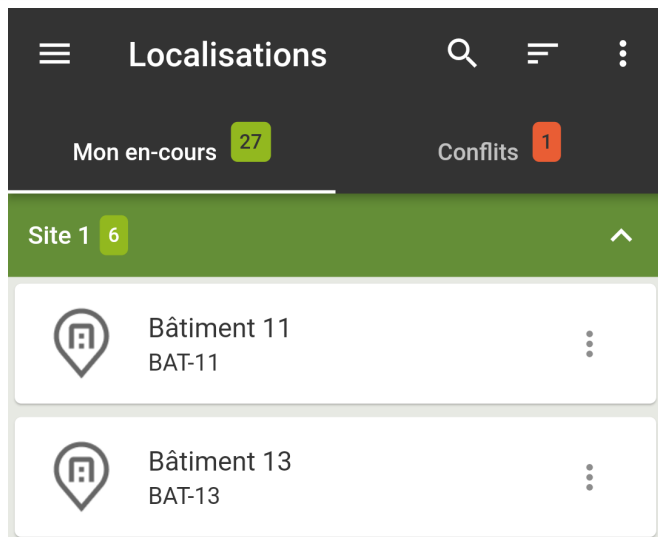
- **«LOCATIONS» tab**: this tab is shown only if the «Conflicts» tab is displayed. It contains the list of locations.
- **«CONFLICTS» tab**: this tab contains locations for which a conflict has been detected.



The conflict display mechanism is described in section [Managing conflicts](#).

Illustration: List of locations when both tabs are displayed





12.3. Details of a location

12.3.1. Presentation

The location details form provides quick, structured access to the information comprising a location, and enables these fields to be changed if necessary.

12.3.2. Access

The location detail form is accessible:

- from the task detail form (via the location of a task),
- from the asset detail form (via the parent location),
- from the main point detail form (via the parent location),
- from the «Locations» function, via the list of locations.

12.3.3. Data displayed



The data listed below corresponds to the structure of the «standard» form. CARL Touch forms are customizable, implying that the form structure may be different in your context.

The location details form contains the following:

«General» block

- Location **model**.
- Location **equipment type**.
- **Work order** authorized (Yes/No flag).



When creating a location, entering a **Model** automatically initialises certain fields on the location form: the model name, equipment type and characteristics (if these are specified as «copyable» in the model in CARL Source).

Note that initialization of data from the model is also possible in off-line mode.

«Links» block

- **Parent location** of the location.

«Comments» block

- **Comment:** comment associated with the location.



Note that the  button is used to add or change the **Comment** field.

Further details about the comment entry mechanism are given in section [Entering and displaying comments](#).

«Characteristics» block

- **List of characteristics** associated with the location.



Characteristics are managed in the same way as for assets: the principle of operation is explained in section [«Characteristics» summary block](#).

The only significant difference between the two contexts is the way information is presented on the detail form:

- In the case of **assets**: the characteristics are presented via a **summary block**.
- In the case of **locations**: the characteristics are shown in a **detail block**.

«Documents» block

- **Number of documents relating to the location.**



Note that the  button is used to add or change documents relating to the location.

Further details about document management are given in section [Managing linked documents](#).

12.3.4. Actions

CARL Touch proposes general actions on the location detail form, as well as actions specific to the fields of a location.

Actions available on the detail form of a location (via the  button)

Button	Button action
NFC pairing	For pairing the current location.
Geolocate	Geolocates the current location (using GPS).
Display on map	If the selected element is geolocated (i.e. has GPS coordinates or an address), this action displays its position on a map.
Task history	Displays the task history for the current location.
Tasks in progress	Displays the tasks in progress for the current location.
Create a task	Creates a task for the current location.
Child equipment	For consulting child locations, main child points, and child assets of the current location.
Asset survey	Allows you to start a survey for the current location - See Asset survey .
Perform an inventory	Allows you to take a measurement or inspection reading for the current location - See Reports .
Entering an event	For entering an event for the current location - See Entering an event .

Context-sensitive actions available for location fields

Context-sensitive actions specific to location fields are accessible via the  button to the right of the field.

Field	Button available	Button action
Template	<i>Access to details</i>	Direct access to the detail screen of the selected model.
	<i>Tasks in progress</i>	Displays the tasks in progress for the selected model.
	<i>Task history</i>	Displays the history of tasks for the selected model.
	<i>Parts list</i>	Displays the individual parts list of the selected model.
Parent location	<i>Access to details</i>	Direct access to the detail screen of the selected parent location.
	<i>NFC pairing</i>	Direct access to the detail screen of the selected parent location.
	<i>Geolocate</i>	Geolocates the parent location (using GPS).
	<i>Display on map</i>	If the parent location is geolocated (i.e. has GPS coordinates or an address), this action displays its position on a map.
	<i>Tasks in progress</i>	Displays the tasks in progress for the selected parent location.
	<i>Child equipment</i>	Displays the child locations, main child points and child assets of the selected parent location.
	<i>Task history</i>	Displays the history of tasks for the selected parent location.
	<i>Asset survey</i>	Allows you to start a survey for the selected parent location - See Asset survey .
	<i>Entering an event</i>	For entering an event for the selected parent location - See Entering an event .

12.4. Usage case: Creating a location

While most locations initially originate from synchronization with CARL Source, the user can also create new locations directly from CARL Touch:

1. From the location list, the user clicks on the  icon.

2. The location creation form is displayed: the fields comprising a location can be entered directly.

10:07

New location

Code

Name

General

Model

Equipment type

Work order authorized

Links

Location

Comments

Comments

Characteristics

CANCEL

SAVE



Only fields preceded by a « * » character are mandatory.



3. The button, to the right of the « *Code* » field, can be used to **scan** a bar code or QR Code using the mobile device’s camera: the *Code* scanned is then automatically inserted into the «Code» field, avoiding the need to type it in manually.

This function is particularly useful when entering new locations which are **already identified** with bar codes or QR Codes (e.g. on identification labels).

4. When creating a location, **entering a « *Model* » automatically initialises certain fields** on the location form: the model name, equipment type and characteristics (if these are specified as «copyable» in the model in CARL Source).



Note that initialization of data from the model is **also possible in off-line mode**.

5. The creation screen shows two main actions:

Button	Button action
CANCEL	Cancel the creation of a location. If the user confirms the cancellation: the list of locations is returned to.

Button	Button action
	Save the new location. Automatic return to the list of locations: the created location can be seen immediately in the list.  The status of a newly created location (e.g. «Validated») is determined by a profile setting in CARL Source (« <i>Status of locations being created</i> »).

13. MAIN POINTS FUNCTION

13.1. Purpose

The «Main points» function enables users to view the information for these structure points, including:

- General information.
- Documents relating to a given main point.

13.2. List of main points

The list form displays various information about main points.

13.2.1. Meaning of icons

The various icons that may be found on the list of main points are:

Icon	Meaning
	Main point «Validated».
	Main point «With conflict».

13.2.2. Data displayed

For each main point on the list of main points, CARL Touch displays the following data subject to availability (i.e. a line is displayed only if the associated data has been entered):

- Main point **description**.
- Main point **code**.
- **Parent location** of the main point.
- Main point **type**.
- Main point **organization**.

13.2.3. Actions

CARL Touch proposes general actions on the main point list form, as well as actions specific to a main point.

	If the available actions for a form cannot all be shown directly on the action bar, additional actions are accessible via the button:  .
---	---

Actions available on the list of main points form

Button	Button action
	Search within the list of main points.
	Add a new main point.

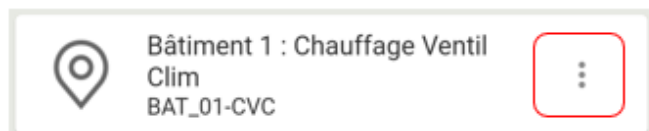
Button	Button action
	Sort main points.

Context-sensitive actions available for an main point

Context-sensitive actions specific to a main point are accessible via the



button to the right of the main point:



Button	Button action
NFC pairing	For pairing the selected main point.
Geolocate	Geolocates the current main point (using GPS).
Display on map	If the selected main point is geolocated (i.e. has GPS coordinates or an address), this action displays its position on a map.
Tasks in progress	Displays the tasks in progress for the selected main point.
Task history	Displays the history of tasks for the main point.
Child equipment	For consulting the main points and child assets for the selected main point.
Asset survey	Allows you to start a survey for the selected main point - See Asset survey .
Take a reading	Allows you to take a measurement or inspection reading for the selected main point - See Reports .
Entering an event	For entering an event for the selected main point - See Entering an event .

13.2.4. List of main points tabs

As default, there are no tabs on the list of main points. However, if a conflict is detected, up to two tabs may be displayed:

- **«MAIN POINTS» tab**: this tab is shown only if the «Conflicts» tab is displayed. It contains the list of main points.
- **«CONFLICTS» tab**: this tab contains the main points for which a conflict has been detected.



The conflict display mechanism is described in section [Managing conflicts](#).

13.3. Details of a main point

13.3.1. Presentation

The main point detail form provides quick, structured access to the information comprising a main point, and enables these fields to be changed if necessary.

13.3.2. Access

The detail form for a main point is accessible from the "Main points" function, from the list of main points.

13.3.3. Data displayed



The data listed below corresponds to the structure of the «standard» form. CARL Touch forms are customizable, implying that the form structure may be different in your context.

The main point detail form contains the following:

«General» block

- Main point **model**.
- Main point **equipment type**.
- **Work order** authorized (Yes/No flag).

«Links» block

- **Parent location** of the main point.

«Comments» block

- **Comment**: comment associated with the main point.



The button is used to add/edit the **Comment** field.

Further details about the comment entry mechanism are given in section [Entering and displaying comments](#).

«Characteristics» block

- **List of characteristics** associated with the main point.



Characteristics are managed in the same way as for assets: the principle of operation is explained in section [«Characteristics» summary block](#).

The only significant difference between the two contexts is the way information is presented on the detail form:

- In the case of **assets**: the characteristics are presented via a **summary block**.
- In the case of **main points**: the characteristics are shown in a **detail block**.

«Documents» block

- **Number of documents linked to the main point**.



The button is used to add/edit documents relating to the main point.

Further details about document management are given in section [Managing linked documents](#).

13.3.4. Actions

CARL Touch proposes general actions on the main point detail form, as well as actions specific to the fields of a main point.

Actions available on a main point detail form (via the



button)

Button	Button action
NFC pairing	For pairing the current main point.
Geolocate	Geolocates the current main point (using GPS).
Display on map	If the selected element is geolocated (i.e. has GPS coordinates or an address), this action displays its position on a map.
Task history	Displays the task history for the current main point.
Tasks in progress	Displays the tasks in progress for the current main point.
Create a task	Creates a task for the current main point.
Child equipment	For consulting the child main points and child assets of the current main point.
Asset survey	Allows you to start a survey for the current main point - See Asset survey .
Perform an inventory	Allows you to take a measurement or inspection reading for the selected main point - See Reports .
Entering an event	For entering an event for the current main point - See Entering an event .

Context-sensitive actions available for main point fields

Context-sensitive actions specific to main point fields are accessible via the  button to the right of the field.

Field	Button available	Button action
Template	Show details	Displays the detail screen for the selected model.
	Tasks in progress	Displays the tasks in progress for the selected model.
	Task history	Displays the history of tasks for the selected model.
	Parts list	Displays the individual parts list for the selected model.
All fields in the «Links» block	Show details	Displays the detail screen for the selected element.
	NFC pairing	Pairs the selected element.
	Geolocate	Geolocates the current element (using GPS).
	Display on map	If the selected element is geolocated (i.e. has GPS coordinates) or has an address, this action displays its position on a map.
	Tasks in progress	Displays tasks in progress for the selected element.
	Task history	Displays the history of tasks for the selected element.
	Child equipment	Consults child links for the selected element.
	Asset survey	Allows you to start a survey for the selected element - See Asset survey .
	Entering an event	For entering an event for the selected element - See Entering an event .

13.4. Usage case: Creating a main point

While most main points initially originate from synchronization with CARL Source, the user can also create new main points directly from CARL Touch:

1. From the list of main points, the user clicks on the  icon.

2. The main point creation form is displayed: the fields comprising a main point can be entered directly.

10:07

← New main point

Code

Name

General

Model

Equipment type

Work order authorized

Links

Location

Main

Comments

Comments

CANCEL SAVE



Only fields preceded by a « * » character are mandatory.



3. The button, to the right of the « *Code* » field, can be used to **scan** a bar code or QR Code using the mobile device’s camera: the *Code* scanned is then automatically inserted into the «Code» field, avoiding the need to type it in manually. This function is particularly useful when entering new main points which are **already identified** with barcodes or QR Codes (e.g. on identification labels).

4. When creating a main point, **entering a « *Model* » automatically initialises certain fields** on the main point form: the model name, equipment type and characteristics (if these are specified as «copyable» in the model in CARL Source).



Note that initialization of data from the model is **also possible in off-line mode**.

5. The creation screen shows two main actions:

Button	Button action
	Cancel the creation of a main point. If the user confirms the cancellation: the list of main points is returned to.

Button	Button action
	Save the new main point. Automatic return to the list of main points: the main point created can be seen immediately in the list.  The status of a newly created main point (e.g. «Validated») is determined by a profile setting in CARL Source (« <i>Status of main points being created</i> »).

14. MODEL DETAIL FORM

14.1. Presentation

The model detail form is used to **view** certain information comprising a model.

14.2. Access

The model detail form is accessible:

- from the task detail («Model» field),
- from the asset detail («Model» field),
- from the location detail («Model» field).

14.3. Representation of a model (icon)

The icon used to represent a model is as follows:

Icon	Element represented
	Template.

14.4. Data displayed



The data listed below corresponds to the structure of the «standard» form. CARL Touch forms are customizable, implying that the form structure may be different in your context.

The model details form contains the following:

«General» block

- Model **family**.
- Model **brand**.
- Model **manufacturer**.
- Model **equipment type**.

«Characteristics» block

- **Number of characteristics** assigned to the model.



The  button is used to add/edit the list of characteristics.

- **Characteristics are managed in the same way as for assets:** the principle of operation is explained in [section «Characteristics» summary block](#).

«Documents» block

- **Number of documents linked to the model.**



The  button is used to add/edit documents relating to the model.

Further details about document management are given in [section Managing linked documents](#).

14.5. Actions

CARL Touch proposes general actions on the model detail form, as well as actions specific to the fields of a model.

 Actions available on the model detail form (via the  button)

Button	Button action
<i>Tasks in progress</i>	Displays the tasks in progress for the selected model.
<i>Task history</i>	Displays the history of tasks for the selected model.
<i>Parts list</i>	Displays the individual parts list for the selected model.

Context-sensitive actions available for model fields

 Context-sensitive actions specific to model fields are accessible via the  button to the right of the field.

Field	Button available	Button action
Family	<i>Task history</i>	Displays the history of tasks for the selected family.

15. REPORTS

15.1. Objective

The "Reports" feature in CARL Touch allows users to view, search, and sort all reports generated from the CARL Touch application. It also allows users to record readings and checkpoints.

15.2. Access

This sub-feature is available:

- either directly from the navigation menu ("*Reports*").
- either via the "Location" feature (select the "Take a reading" action),
- either via the "*Key Points*" feature (select the "*Perform an Inspection*" action),
- either via the "Equipment" feature (select the "Take an inventory" action),

15.3. List of reports

The list of reports allows the user to browse and view all reports generated from the mobile device.

15.3.1. Data displayed

Within the list of reports, and for each report, CARL Touch displays the following data:

- **Item description and {code}** associated with the report.
- **Value** of the reading.
- **Date and time** of the reading.

15.3.2. Actions

CARL Touch offers global actions on the list of readings form.



When all available actions for a form cannot be displayed directly on the action bar, additional actions are accessible via the button:



Actions available on the list of readings form

Button	Button action
	Search within the list of records.
	Creating a work order.
	Sorting of reports.

Contextual actions available on a line in the report

Contextual actions specific to a line in the report are accessible via the button:../resources/images/CXT-AA/image381.png[image,width=50,height=50], located on the right side of the report:

Button	Button action
<i>Take reading again</i>	Create a new reading at the same location.

15.4. Details of a work order

15.4.1. Overview

The work order detail form provides quick access to the information contained in a work order. This information is view-only.

15.4.2. Data displayed

The structure of the detail form for a work order depends on the item type.

These various forms are described in the chapters corresponding to the following topics:

- for reading: see [Data displayed for a reading](#).
- for inspection reports: see [Data displayed for an inspection report](#).

15.5. Creating a work order

It takes the form of a wizard that guides the user step-by-step through the inspection process.

Metric entry is also accessible from the details of an asset, a Location, or a Main point.

15.5.1. Step 1 – Data to be recorded

15.5.1.1. Overview

This step allows the user to select the equipment to be inspected.

15.5.1.2. Data displayed

This step features a drop-down list from which you can select the type of equipment to be recorded:

- Location
- Main point
- Asset

After selecting the equipment type, the equipment list is updated.

Each line in this list displays the following information:

- **Equipment description and {code}** to be recorded.



15.5.1.3. Actions

Proceed to the next step of the Wizard

- **Selecting a piece of equipment** from the list **takes you to the next step** of the Wizard.

15.5.2. Step 2 – Key Point

15.5.2.1. Overview

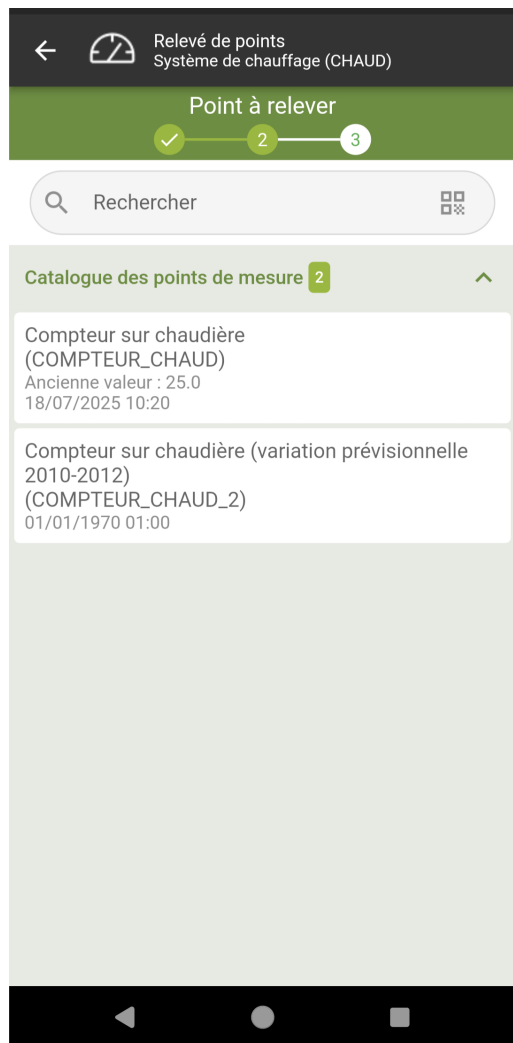
This step allows the user to select the reading point or inspection point to be recorded.

15.5.2.2. Data displayed

This step displays the list of reading points and checkpoints.

Each line in this list displays the following information:

- **Item description and {code}** to be noted.
- **Last value** recorded for this item.
- **Date and time** of the last reading.



15.5.2.3. Actions

Proceed to the next step of the Wizard

- **Selecting an item** from the list leads to the entry of a new reading.

15.5.3. Step '3' - Entering the report

15.5.3.1. Overview

This step allows the user to enter the recorded value, either at a reading point or at a checkpoint. The information displayed varies depending on the type of item.

15.5.3.2. Data displayed for a reading

This step displays the reading information:

- **Equipment:** Equipment associated with the reading point.
- **Reading point:** A reading point for which a reading is requested.
- **Regression:** Indicates whether regressions are permitted at this reading point.
- **Minimum value:** Information on the minimum allowed value at this reading point.
- **Max Value:** Information on the maximum allowed value at this Reading point.
- **Previous value:** Previous value from the reading.
- **Reading Date:** Date of the previous reading.
- **New value:** Value recorded at the reading point.

- **Variation in reading:** Variation observed at the reading point.
- **Correction:** Information indicating whether the reading is a correction.
- **Comment:** Optional comment.

15.5.3.3. Data displayed for an inspection report

This step displays the inspection report information:

- **Equipment:** Equipment associated with the Checkpoint.
- **Checkpoint:** A checkpoint for which a reading is requested.
- **Previous value:** Previous value from the inspection report.
- **Date of previous reading:** Date of the previous inspection reading.
- **Reading Value:** Value recorded at the Checkpoint. A list of values associated with the Checkpoint is provided.
- **Comment:** Optional comment.

15.5.3.4. Actions

Proceed to the next step of the Wizard

- Pressing the **Next** button **proceeds to the next entry**.
- Pressing the **Save** button confirms the entry.
- Pressing the **Cancel** button cancels the entry of the report.

16. ITEMS FUNCTION

16.1. Purpose

The «Items» function in CARL Touch allows users to consult item catalogs, gives them access to the item detail form and enables them to familiarize themselves with information such as:

- General information about items.
- Item storage details.
- Item equipment links.
- Item characteristics.
- Documents linked to an item.

16.2. List of items

The list form displays various information about items.

16.2.1. Meaning of icons

The various icons that may be found on the list of items are:

Icon	Element represented
	Item.
	Item «With conflict»

16.2.2. Data displayed

For each item on the item list, CARL Touch displays the following data subject to availability (i.e. a line is displayed only if the associated data has been entered):

- Item **description**.
- Item **code**.
- Item **manufacturer**.
- **Manufacturer's reference** for the item.

16.2.3. Actions

CARL Touch proposes general actions on the item list form.

	If the available actions for a form cannot all be shown directly on the action bar, additional actions are accessible via the button: 
---	---

Actions available on the item list form

Button	Button action
	Search within the list of items.

Button	Button action
	Sort the items.

16.2.4. Item list tabs

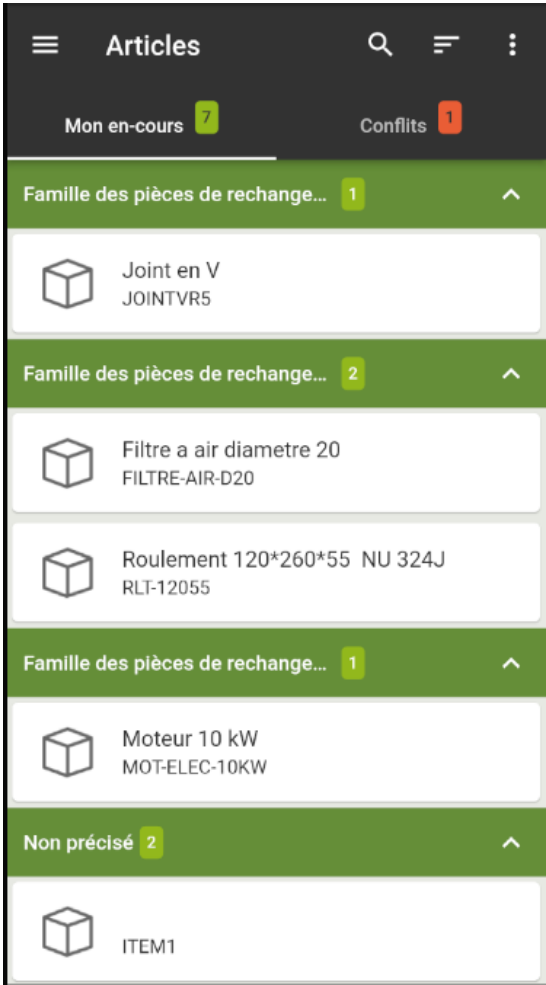
As default, there are no tabs on the list of items. However, if a conflict is detected, up to two tabs may be displayed:

- **«ITEMS»** tab: this tab is shown only if the «Conflicts» tab is displayed. It contains the list of items.
- **«CONFLICTS»** tab: this tab contains items for which a conflict has been detected.



The conflict display mechanism is described in section [Managing conflicts](#).

Illustration: List of items when both tabs are displayed



16.3. Item details

The item detail form is accessible from the list of items.

16.3.1. Representation of an item (icon)

The icon used to represent an item is as follows:

Icon	Element represented
	Item.

16.3.2. Data displayed



The data listed below corresponds to the structure of the «standard» form. CARL Touch forms are customizable, implying that the form structure may be different in your context.

The model details form contains the following:

«General» block

- Item **family**.
- Item **category**.
- Item **manufacturer**.
- **Manufacturer's reference** for the item.

«Management» block

- **Item management unit**.
- **AP** for the item.
- **Serialized**: indicator (Y/N).

«Characteristics» block

- **Number of characteristics** associated with the item.



The  button is used to add/edit the list of characteristics.

Characteristics are managed in the same way as for assets: the principle of operation is explained in [section «Characteristics» summary block](#).

«Documents» block

- **Number of documents relating to the item**.



The  button is used to add/edit documents relating to the item.

Further details about document management are given in [section Managing linked documents](#).

«Storage details» block

- **Stock lines** by warehouse



Stock lines contain the following information:

- Location
- Batch or serial number
- Use-by date
- Quantity

If there is no stock, the list is not empty: a "No stock" message is displayed.

16.4. Actions

CARL Touch offers global actions on the item detail form.

Actions available on an item’s detail form (via the  button)

Button	Button action
<i>Change location</i>	For changing the location of the current item.
<i>Enter in stock</i>	For entering an input for the current item.
<i>Perform inventory</i>	For entering an inventory movement for the current item.
<i>Withdraw from stock</i>	For entering a withdrawal for the current item.

Context-sensitive actions specific to item fields are accessible via the  button to the right of the field.

Field	Button available	Button action
Family	<i>Task history</i>	Displays the history of tasks for the selected family.

17. STOCK MOVEMENTS FUNCTION

17.1. Purpose

The «Stock movements» function is used to view, search and sort all stock movements generated from the CARL Touch application. It also provides access to the sub-functions for creating new stock movements.

17.2. List of stock movements

The list of stock movements enables users to browse and view all movements generated from the mobile device.

Depending on the context, these movements are displayed in one of the three tabs available for this list – see [List of stock movements tabs](#).



«Prepared inventories» stock movements do not appear on this list. These movements can be viewed only via the «Prepared inventories» function - see section [Prepared inventories function](#).

17.2.1. Meaning of icons

The following icons may be displayed in the list of stock movements:

Icon	Meaning
	"Withdrawal" movements.
	"Entry" movements.
	"Change of location" movements.
	« Spontaneous inventory » movements.
	« Withdrawal » movements with a conflict.
	« Entry » movements with a conflict.
	« Change of location » movements with a conflict.
	« Spontaneous inventory » movements with a conflict.

17.2.2. Data displayed

For each movement on the stock movements list, CARL Touch displays the following data subject to availability (i.e. a line is displayed only if the associated data has been entered):

- **Movement type name** (i.e. "Withdrawal", "Entry", etc.).

- Movement **date**.
- **Name and code of the item** associated with the movement.
- **Name and code of the warehouse** associated with the movement.
- **Name and code of the location** associated with the movement.
- **Name and code of the item's destination location**.
- **Batch number or Asset name and code**.
- **«Quantity» button**: this displays the quantity processed in the stock movement.



- **Name and code of the location**:
in the event of a «Change of location» movement, this information relates to the item's location of origin.
- **Name and code of the destination location**:
only for a «Change of location» movement.
- **Batch number or Asset name and code**:
Only if the movement relates to a batch-managed item or a serialized asset.
- **«Quantity» button**:
This quantity can be changed (by clicking) only if the current movement is in "conflict" (i.e. included in the "CONFLICTS" tab). See how tabs work in section [List of stock movements tabs](#).

17.2.3. Actions

CARL Touch proposes general actions on the list of stock movements form.



If the available actions for a form cannot all be shown directly on the action bar, additional actions are accessible via the button:



Actions available on the list of stock movements form

Button	Button action
	Search within the list of stock movements.
	Create a stock movement (by means of the associated sub-function): • Withdrawal – see Sub-function: Withdrawal. • Entry – see Sub-function: Entry. • Change of location – see Sub-function: Change of location. • Spontaneous inventory – see Sub-function: Spontaneous inventory.
	Sort stock movements.

17.2.4. List of stock movements tabs

As default, there are no tabs on the list of stock movements: the display shows the list of movements that have been synchronized with CARL Source and that have not resulted in a rejection. However, depending on the context, several tabs may be displayed:

- **«MY IN-PROGRESS ITEMS» tab**: this tab is shown only if another tab is displayed.
It contains the list of stock movements
- **«CONFLICTS» tab**: this tab contains stock movements for which a conflict has been detected.



The conflict display mechanism is described in section [Managing conflicts](#).

Illustration: List of stock movements when the 2 tabs are displayed



17.3. Details of a stock movement

17.3.1. Presentation

The stock movement detail form provides quick, structured access to the information comprising a movement, and enables these fields to be changed if necessary.

17.3.2. Data displayed

The structure of the stock movement detail form depends on the type of movement (e.g. «Withdrawal», «Entry», etc.).

These various forms are described in the sections corresponding to the sub-functions:

- for a «Withdrawal» movement: see [Sub-function: Withdrawal](#).
- for an «Entry» movement: see [Sub-function: Entry](#).
- for a «Change of location» movement: see [Sub-function: Change of location](#).
- for a «Spontaneous inventory» movement: see [Sub-function: Spontaneous inventory](#).

18. SUB-FUNCTION: WITHDRAWAL

18.1. Presentation

The «Withdrawal» sub-function is associated with the «Stock movements» function and enables users to carry out a stock withdrawal from CARL Touch.

It is presented in the form of a wizard that guides users step-by-step through the withdrawal process.



The operating principles for wizards are set out in section [Wizards](#)

18.2. Access

The «Withdrawal» sub-function is accessible:

- from the "Stock movements" function (click on the  icon and select the "Withdrawal" option),
- from the main CARL Touch navigation menu (« Withdrawal").

18.3. Step 1: allocation selection

This step enables users to select the allocation. In this step, users must:

- **choose the type of allocation** from those proposed by CARL Touch,
- **then specify the allocation element to which the item withdrawal will be allocated.**



This allocation is specified from a list proposed by CARL Touch (the contents of the list depends on the type of allocation):

Types of allocation proposed to users	Information displayed by CARL Touch after the type of allocation has been selected
Cost center	CARL Touch displays the list of «active» cost centers accessible by the user.
Work order	CARL Touch displays the list of work orders [Network connection required].
Asset	CARL Touch displays the list of «active» assets accessible by the user.
Structure point	CARL Touch displays the list of «active» structure points accessible by the user.
No allocation	CARL Touch takes the user directly to the next step in the wizard.

- Once the user has selected an allocation element from one of these lists, the wizard moves on to the next step.

18.4. Step 2 – Select an item to be withdrawn

18.4.1. Presentation

This step enables users to select the reserved item to be withdrawn from the warehouse.

In the event of a withdrawal for a work order, users can also add an item to be withdrawn from stock for the work order, by means of a list of items in stock unrelated to the work order.

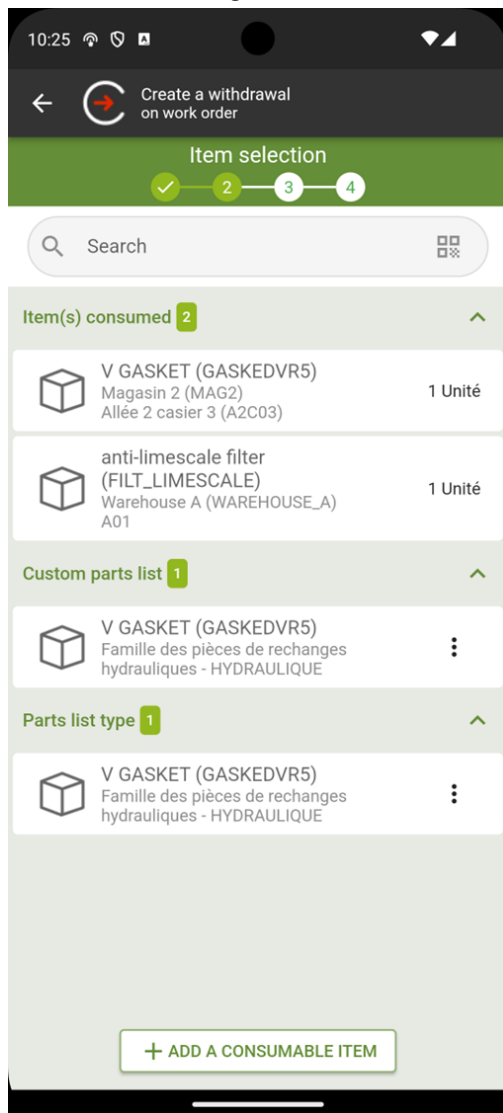
18.4.2. Data displayed

This step presents a list of items (the content varies depending on the context).

In the event of a withdrawal for a «work order» allocation, CARL Touch will propose in the first instance:

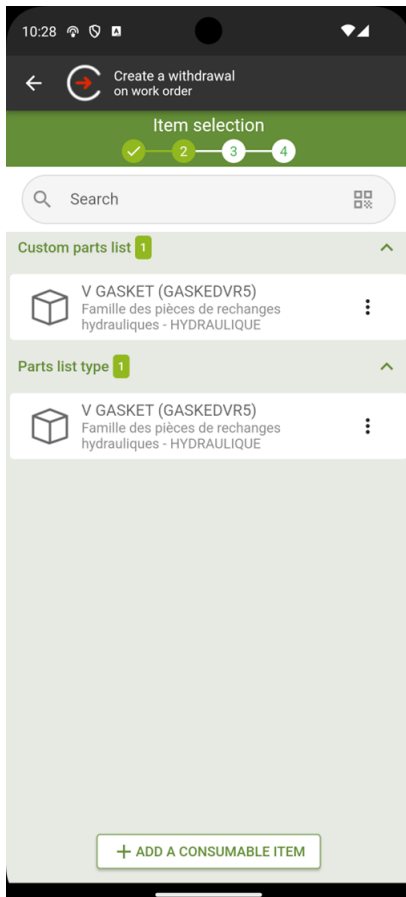
- Items already consumed for the work order.

- Items reserved for the work order.
- Items from the individualized parts list for the asset associated with the work order.
- Items from the standard parts list for the work order template.
- All items in the catalog.



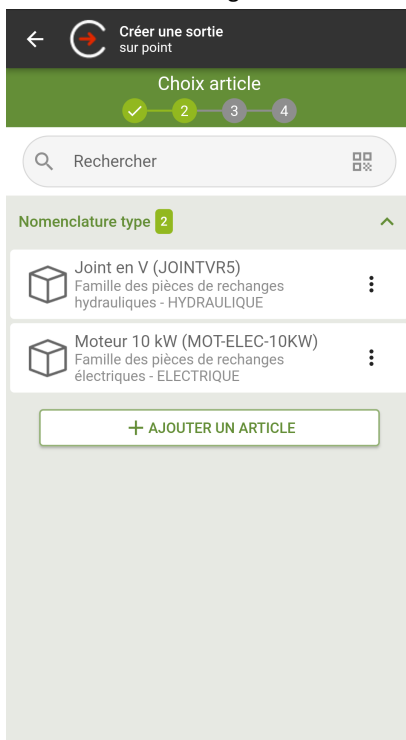
In the event of a withdrawal for an «asset allocation, CARL Touch will propose in the first instance:

- Items from the individualized parts list for the asset.
- Items from the standard parts list for the model associated with the asset.
- All items in the catalog.

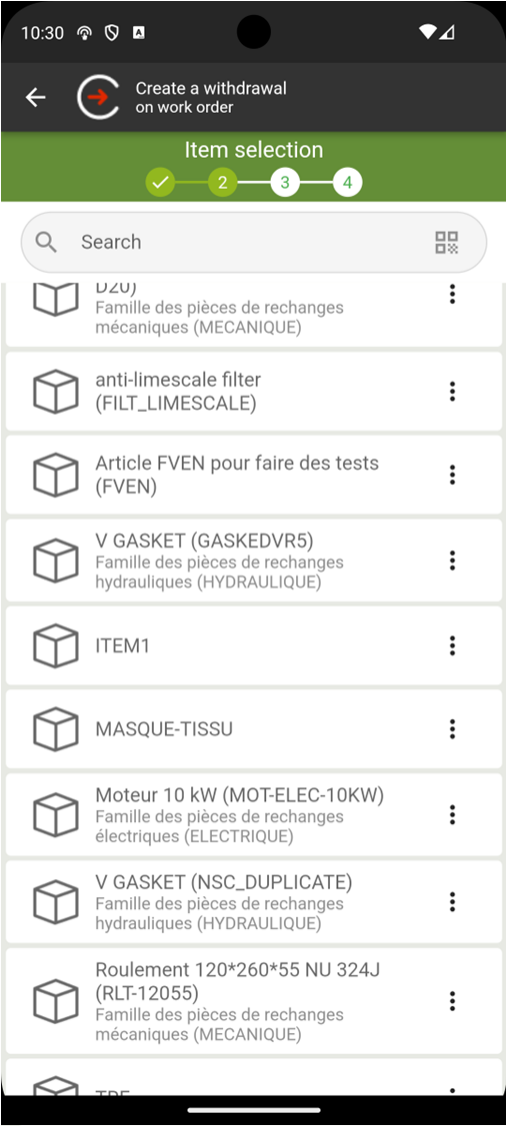


In the event of a withdrawal for a «structure point» allocation, CARL Touch will propose in the first instance:

- Items from the standard parts list for the structure point.
- All items in the catalog.



In the event of a withdrawal for a «cost center» or with «no allocation», CARL Touch will propose all items in the catalog from the outset.



Each line of this list presents the following information:

- **Name and code of the item** to be withdrawn.
- **Name and code of the family of the item** to be withdrawn.

18.4.3. Actions

Next step in the wizard

- The wizard moves on to the **next step** once an **item has been selected** from the list.

Context-sensitive actions available on an item line



Context-sensitive actions specific to an item line are accessible via the button to the right of the item:

Button	Button action
Access to details	Displays the detail form for the selected item.

18.5. Step 3 – Select the item location

18.5.1. Presentation

This step enables users to select the location at which the item selected in the previous step will be consumed (withdrawn).



This step may be « **skipped** » (i.e. automatically omitted by passing directly to the next step in the wizard – see [Wizards](#)) if the selected item is included in only one location, in order to avoid unnecessary data entry.

18.5.2. Data displayed

This step proposes a list of locations containing the item selected in Step 1.

Each line of this list presents the following information:

- **Name and code of the warehouse** in which the item is present (grouping block).
- **Name and code of the location** in which the item is present.
- **Batch number** (for batch-managed item).
- **Name and code of the asset** (for a serialized item).
- **Use-by date** (for a batch-managed or serialized item).
- **Quantity** in stock at this location.

18.5.3. Actions

Next step in the wizard

- The wizard **moves on to the next step** once a **location has been selected** from the list.

18.6. Step 4 – Enter the quantity to be withdrawn

18.6.1. Presentation

This step enables users to enter the details of the item withdrawal to be carried out.

18.6.2. Data displayed

← Créer une sortie sans imputation

Quantité à sortir

Sortie (SORTIE)
Sans imputation

Roulement 120*260*55 NU 324J (RLT-12055)
Magasin 1 (MAG1)
Allée 1 casier 10 (A1C10)
Lot 2131

Qté en stock 8 Unité

Qté à sortir* 2 Unité

Qté après sortie 6 Unité

Intervenant* DMAS

Type de mouvement Sortie (SORTIE)

Commentaire Stock conforme

ANNULER ENREGISTRER

This step presents the following data:

- **Name and code of the item** to be withdrawn.
- **Name and code of the warehouse - Name and code of the location** from which the withdrawal is to be carried out.
- **Batch number** (for batch-managed item).
- **Name and code of the asset** (for a serialized item).
- **Use-by date**.
- **Quantity** in stock at this location.
- **Reserved quantity** (only for a «work order» allocation).
- **Quantity already consumed** (only for a «work order» allocation).
- **Remaining quantity to be withdrawn** (only for a «work order» allocation).
- **Quantity to be withdrawn**.
- **Quantity remaining after withdrawal**: Enables users to state the remaining quantity of the item after the withdrawal has been carried out. (Hidden for serialized items).
- **Type of withdrawal**.
- **Technician** carrying out the withdrawal.
- **Comment**.

18.6.3. Actions

Context-sensitive actions available on the form fields

Context-sensitive actions specific to form fields are accessible via the  button to the right of the field.

Field	Button action
Type of withdrawal	Displays the list of «Withdrawal» movements.  - This list is available offline. - The field is hidden if there is only one withdrawal movement.
Technician	Displays the list of «active» agents.  Requires a connection to the server.

Actions available on the form for this step

The actions available on the form at this stage correspond to the generic wizard actions (see [Actions](#)).

- **Confirmation of the screen** using the "Save" or "Link" buttons **creates the withdrawal movement** for the selected item.



- The « **Cancel** » action is used to **discard** the withdrawal movement data entered (after confirmation).

19. SUB-FUNCTION: ENTRY

19.1. Presentation

The «Entry» sub-function is associated with the «Stock movements» function and enables users to carry out a stock entry from CARL Touch.

It is presented in the form of a wizard that guides users step-by-step through the entry process.



The operating principles for wizards are set out in section [Wizards](#).

19.2. Access

The «Entry» sub-function is accessible:

-



from the "Stock movements" function (click on the  icon and select the "Entry" option),

- from the main CARL Touch navigation menu (« Entry").

19.3. Step 1: allocation selection

This step allows you to select the allocation. In this step, users must:

- **choose the type of allocation** from those proposed by CARL Touch,
- **then specify the allocation element to which the item entry will be allocated.**



This allocation is specified from a list proposed by CARL Touch (the contents of the list depends on the type of allocation):

Types of allocation proposed to users	Information displayed by CARL Touch after the type of allocation has been selected
Cost center	CARL Touch displays the list of «active» cost centers accessible by the user.
Work order	CARL Touch displays the list of work orders [Network connection required].
Asset	CARL Touch displays the list of «active» assets accessible by the user.
Structure point	CARL Touch displays the list of «active» structure points accessible by the user.
Inventory purchase	CARL Touch displays the list of items from a purchase reception with receiving check accessible to the user.
Transfer	CARL Touch displays the list of items from a transfer request with receiving check accessible to the user.
No allocation	CARL Touch takes the user directly to the next step in the wizard.

- Once the user has selected an allocation element from one of these lists, the wizard moves on to the next step.

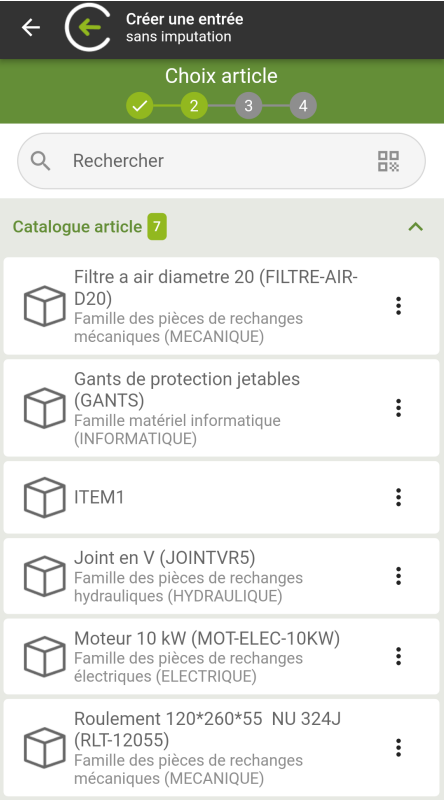
19.4. Step 2 – Select an item to be entered

19.4.1. Presentation

This step enables users to select the item to be entered in a warehouse.

19.4.2. Data displayed

This step presents a list of items (the content varies depending on the context).
The data displayed for Step 1 of a stock entry follows the same rules as for the initialization of Step 1 of a stock withdrawal (see *Data displayed*).



19.4.3. Actions

Next step in the wizard

- The wizard moves on to the **next step** once an **item has been selected** from the list.

Context-sensitive actions available on an item line

Context-sensitive actions specific to an item line are accessible via the  button to the right of the item:

Button	Button action
Access to details	Displays the detail form for the selected item.

19.5. Step 3 – Select the item location

19.5.1. Presentation

This step enables users to select the location at which the item selected in the previous step will be entered.



This step may be « **skipped** » (i.e. automatically omitted by passing directly to the next step in the wizard – see [Principle](#)) if the selected item is included in only one location, in order to avoid unnecessary data entry.

19.5.2. Data displayed

This step proposes a list of locations containing the item selected in Step 2.

Each line of this list presents the following information:

- **Name and code of the warehouse** in which the item is present.
- **Name and code of the location** in which the item is present.
- **Batch number** (for batch-managed item).
- **Name and code of the asset** (for a serialized item).
- **Use-by date** (for a batch-managed or serialized item).
- **Quantity** in stock at this location.

19.5.3. Actions

Next step in the wizard

- The wizard **moves on to the next step** once a **location has been selected** from the list.

19.6. Step 4 – Select the item batch

19.6.1. Presentation

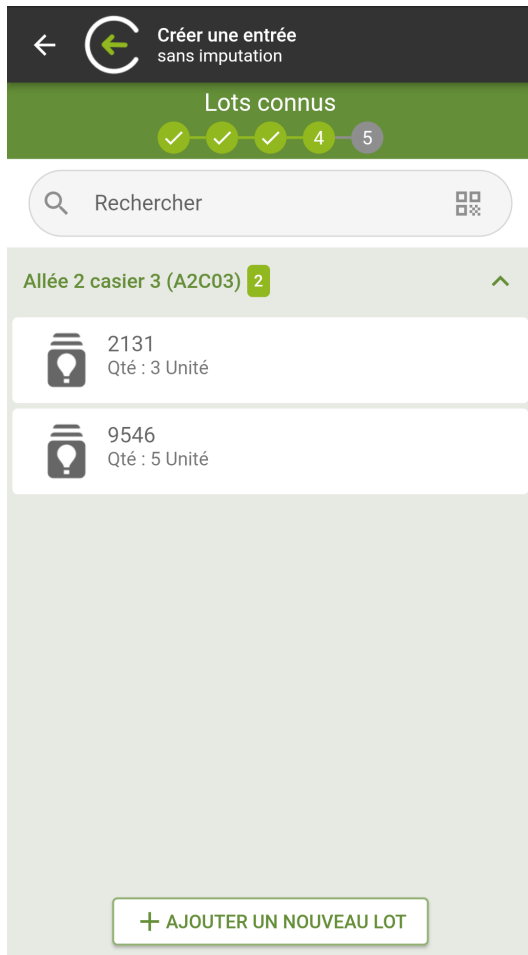
This step enables users to select the batch number of the item affected by the stock entry.



This step is proposed only for entry of a batch-managed item and excluding transfer entries. For ordinary items or serialized items, the wizard proceeds directly to the «Quantity to be entered» step.

19.6.2. Data displayed

This step proposes a list of locations containing the item selected in Step 2.



Each line of this list presents the following information:

- **Description and code of the location** selected in the previous step.
- **Batch number.**
- **Use-by date.**
- **Quantity** in stock at this location.

19.6.3. Actions

Next step in the wizard

- The wizard **moves on to the next step** once a **location has been selected** from the list.

19.7. Step 4 – Enter the quantity to be entered

19.7.1. Presentation

This step enables users to enter the details of the item entry to be carried out.

	When entering batch-managed items, and excluding transfer entries, into stock, this is Step 5.
	In the case of the transfer entry: • For items that are batch managed, the batch number is pre-entered and cannot be changed. • For serialized items, the asset is pre-entered and cannot be changed.

19.7.2. Data displayed

Etape 4 : pour un article ni géré en lots, ni sérialisé

Etape 4 : pour un article sérialisé

Etape 5 : pour un article géré en lots

This step presents the following data:

- **Name and code of the item** to be entered.
- **Name and code of the warehouse** in which the entry is to be carried out.
- **Name and code of the location** in which the entry is to be carried out.
- **Batch number** (for batch-managed item).
- **Name and code of the asset** (for a serialized item).
- **Use-by date** (for a batch-managed or serialized item).
- **Quantity** in stock at this location.
- **Quantity consumed** (only for a «work order» allocation).
- **Quantity already returned** (only for a «work order» allocation).
- **Quantity to be entered**.
- **Quantity after entry**. Enables users to state the total quantity of the item after the entry has been carried out. (Hidden for serialized items).
- **Type of entry**. (Hidden if there is only one type of entry)
- **Agent** carrying out the entry.
- **Comment**.

19.7.3. Actions

Context-sensitive actions available on the form fields

Context-sensitive actions specific to form fields are accessible via the



button to the right of the field.

Field	Button action
Type of entry	Displays the list of «Entry» movements.  • This list is available offline. • The field is hidden if there is only one entry movement.
Technician	Displays the list of «active» agents.  Requires a connection to the server.

Actions available on the form for this step

The actions available on the form at this stage correspond to the generic wizard actions (see [Actions](#)).

- The **confirmation screen**, accessed via the "Save" or "Link" buttons, **creates an entry movement** for the selected item.



- The «**Cancel**» action is used to **discard** the entry movement data entered (after confirmation).

20. SUB-FUNCTION: CHANGE OF LOCATION

20.1. Presentation

The «Change of location» sub-function is associated with the «Stock movements» function and enables users to change the location of an item in stock from CARL Touch.

It is presented in the form of a wizard that guides users step-by-step through the change of location process.



The operating principles for wizards are set out in section [Wizards](#).

20.2. Access

This sub-function is associated with the «Stock movements» function.

It is accessible:

-  Either via the « *Stock movements* » function (click on the  icon and select the « *Change of location* » option),
- Or directly from the navigation menu (« *Change of location* »).

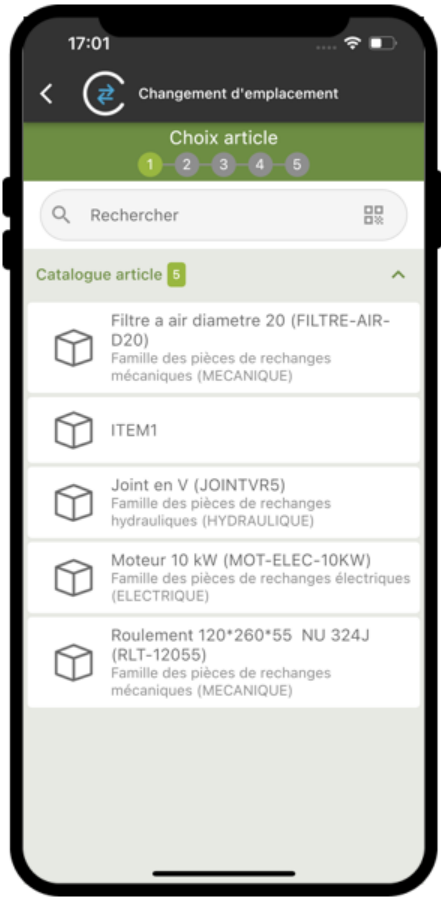
20.3. Step 1 – Select an item to be moved

20.3.1. Presentation

This step enables users to select the item to be moved.

20.3.2. Data displayed

This step presents a list of items (the content varies depending on the context).



Each line of this list presents the following information:

- **Name and code of the item** to be moved.
- **Name and code of the item family**.

20.3.3. Actions

Next step in the wizard

- The wizard moves on to the **next step** once an **item has been selected** from the list.

Context-sensitive actions available on an item line

Context-sensitive actions specific to an item line are accessible via the  button to the right of the item:

Button	Button action
<i>Access to details</i>	Displays the detail form for the selected item.

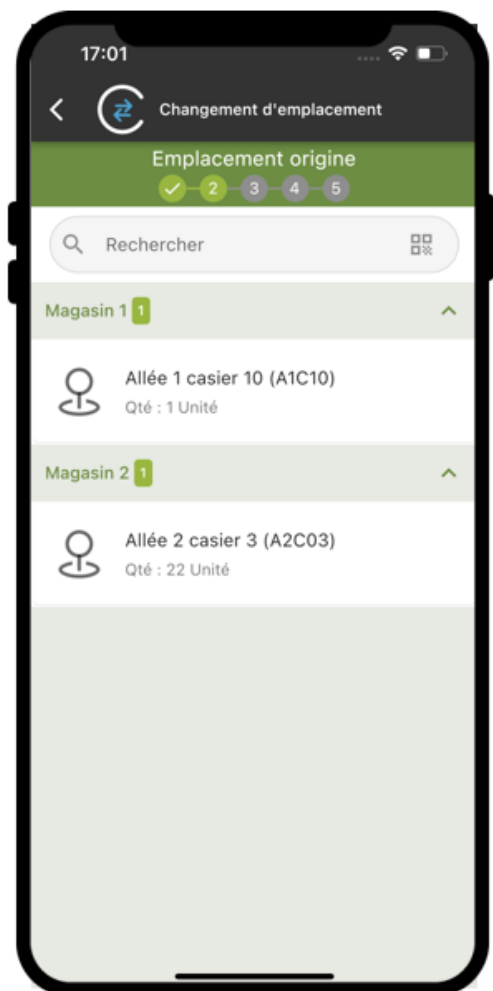
20.4. Step 2 – Select the item location

20.4.1. Presentation

This step enables users to select the location from which the item selected in the previous step will be moved.

20.4.2. Data displayed

This step proposes a list of locations containing the item selected in Step 1.



Each line of this list presents the following information:

- **Name and code of the warehouse** in which the item is present.
- **Name and code of the location** in which the item is present.
- **Batch number** (for batch-managed item).
- **Name and code of the asset** (for a serialized item).
- **Use-by date** (for a batch-managed or serialized item).
- **Quantity** in stock at this location.

20.4.3. Actions

Next step in the wizard

- The wizard **moves on to the next step** once a **location has been selected** from the list.

20.5. Step 3 – Enter the quantity to be moved

20.5.1. Presentation

This step enables users to enter the quantity of the item selected in Step 1 to be moved. The articles will be moved from the location selected in Step 2.

20.5.2. Data displayed

This step presents the following data:

- **Name and code of the item** to be moved.
- **Name and code of the warehouse - Name and code of the location** from which the item is to be moved.
- **Batch number** (for batch-managed item).
- **Name and code of the asset** (for a serialized item).
- **Use-by date** (for a batch-managed or serialized item).
- **Quantity in stock at this location.**
- **Quantity moved:** Enter the quantity of the item to be moved from this location.
- **Clear location/item:** In the event that the total quantity of an item in the selected location is to be moved, this check box is used to delete the link between the item and the storage location of origin.
- **Remaining quantity in location:** This enables users to state the quantity of the item remaining in the location of origin after the stock movement has been completed.
- **Movement:** «Change of location» stock movement (hidden if there is only one type of change of location).
- **Technician:** Code of the technician carrying out the change of location (as default, that of the connected user).
- **Comment.**

20.5.3. Actions

Actions available on the form for this step

The actions available on the form at this stage correspond to the generic wizard actions (see [Actions](#)).

- The **validation screen**, accessed via the « Save » button, enables users to save the information entered in Step 3 and to proceed to Step 4.

20.6. Step 4 – Enter the destination location

20.6.1. Presentation

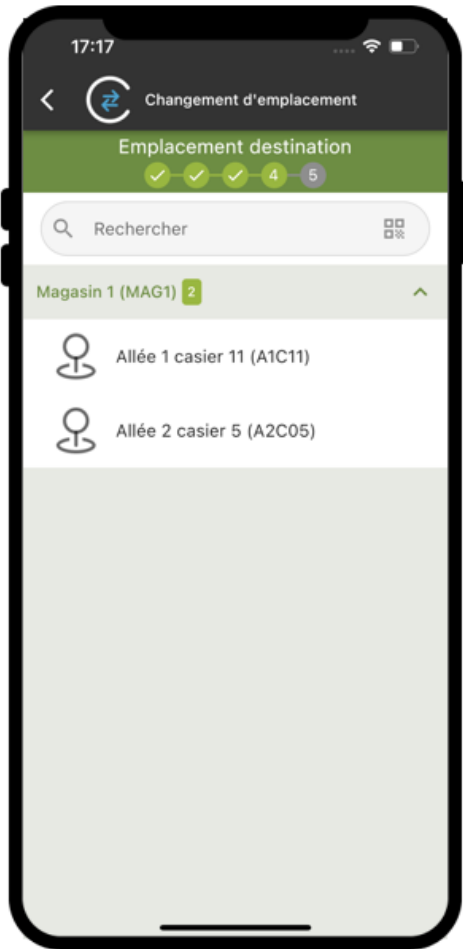
This step enables users to enter the destination location for the item movement.



This step may be « **skipped** » (i.e. automatically omitted by passing directly to the next step in the wizard – see [Principle](#)) if there is only one location to which the selected item can be moved. This applies when the item is stocked in only two locations in the same warehouse.

20.6.2. Data displayed

This step presents the following data:



- **Name and code of the destination location.**
- **Quantity** in stock at this location.

20.6.3. Actions

The «Choose another location» button is used to display all the warehouse storage locations and enables users to select a location other than those already stated for the item selected in Step 1.



20.7. Step 5 – Confirm the change of location

20.7.1. Presentation

This step presents a summary of the change of location of the item and enables users to save the operation.

20.7.2. Data displayed

This step presents the following data:



17:17

<  Changement d'emplacement

Validation

✓ ✓ ✓ ✓ 5

Joint en V (JOINTVR5)
Magasin 1 (MAG1)

Emplacement origine
Allée 1 casier 10 (A1C10)

Emplacement destination
Allée 2 casier 5 (A2C05)

Qté en stock 1 Unité
Qté déplacée 1 Unité
Qté emplacement restante 0 Unité

Libérer emplacement/article ☐

Intervenant*
Acteur de l'utilisateur DEMO (DEMO)

Commentaire

ENCHAÎNER

ANNULER ENREGISTRER

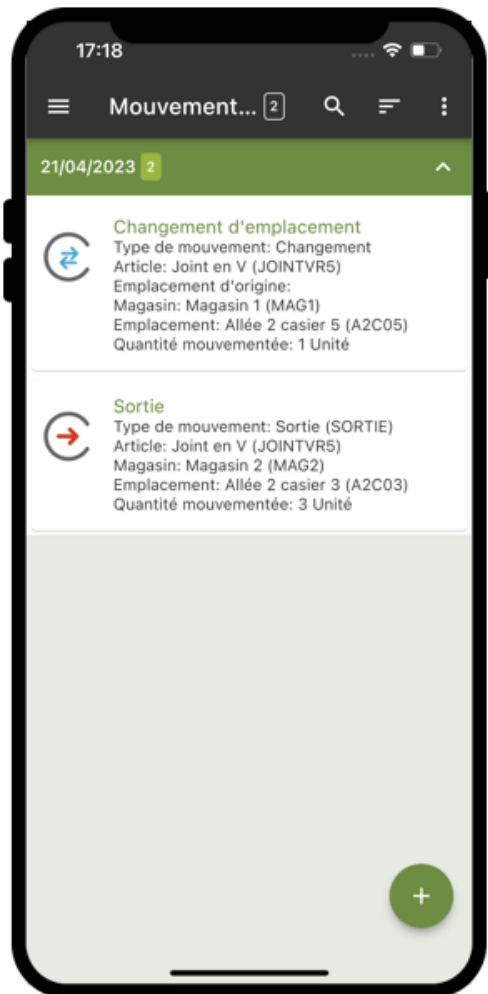
- **Name and code of the item** to be moved.
- **Name and code of the warehouse** in which the change of location is to take place.
- **Name and code of the location** of origin.
- **Remaining quantity** of the item in the location of origin.
- **Name and code of the destination location**.
- **Quantity moved**.
- **Clear location (origin)/item**. By checking this box, the link between the item and the storage location of origin will be deleted.
- **Name (or code if name not entered) of the change of location movement**.
- **Code of the technician carrying out the change of location of the item**.
- **Comment**.

20.7.3. Actions

Actions available on the form for this step

The actions available on the form at this stage correspond to the generic wizard actions (see [Actions](#)).

- **The validation screen**, accessed via the « *Save* » or « *Link* » buttons, **creates a change of location movement** for the selected item.



- The «Cancel» action is used to discard the change of location movement data entered (after confirmation).

21. SUB-FUNCTION: SPONTANEOUS INVENTORY

21.1. Presentation

The «Spontaneous inventory» sub-function is associated with the «Stock movements» function and enables users to carry out an inventory of an item or a storage location from CARL Touch.

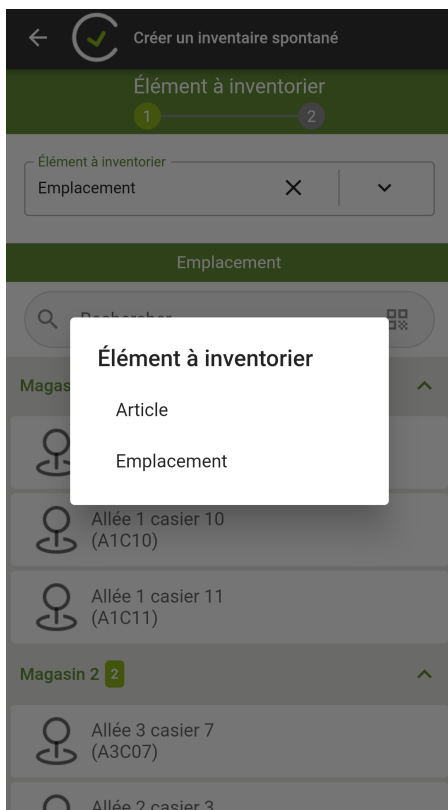
21.2. Access

This sub-function is associated with the «Stock movements» function.

It is accessible:

-  Either via the « *Stock movements* » function (click on the  icon and select the « *Spontaneous inventory* » option),
- Or directly from the navigation menu (« *Spontaneous inventory* »).

21.3. Selecting the element to be inventoried



Users must select the inventory method to be implemented:

- To inventory all locations for a given item, the «Item» option should be selected.
- To inventory all items in a given location, the «Location» option should be selected.

21.3.1. Taking inventory by location

21.3.1.1. Presentation

This inventory method enables users to select a storage location and to take inventory of its entire contents, i.e. all the items stored in the selected location.

21.3.1.2. Selecting the location to be inventoried

Selecting the «Taking inventory by location» option displays the list of storage locations in each warehouse.

The screenshot shows the 'Créer un inventaire spontané' (Create spontaneous inventory) screen. At the top, there is a dark header with a back arrow, a green checkmark icon, and the text 'Créer un inventaire spontané'. Below this is a green bar with the text 'Élément à inventorier' and a progress indicator with two steps: '1' (highlighted) and '2'. Underneath, there is a search bar labeled 'Élément à inventorier' with the text 'Emplacement' and a dropdown arrow. Below the search bar is a green bar with the text 'Emplacement'. Underneath is a search bar with a magnifying glass icon, the text 'Rechercher', and a QR code icon. Below the search bar is a list of storage locations. The list is divided into two sections: 'Magasin 1' (highlighted) and 'Magasin 2'. 'Magasin 1' contains three items: 'Allée 2 casier 5 (A2C05)', 'Allée 1 casier 10 (A1C10)', and 'Allée 1 casier 11 (A1C11)'. 'Magasin 2' contains two items: 'Allée 3 casier 7 (A3C07)' and 'Allée 2 casier 3'.

Users should select the storage location in the warehouse of their choice. The inventory will be carried out for the selected storage location.

21.3.1.3. Storage lines to be inventoried

Selecting the location serves to initialise the list of items to be inventoried in the previously selected location.

Créer un inventaire spontané sur emplacement

Réalisation de l'inventaire

Rechercher

Allée 1 casier 10 (A1C10) 5

ITEM1	Qté : 10 Unité	☐
Joint en V (JOINTVR5)	Qté : 1 Unité	☐
Moteur 10 kW (MOT-ELEC-10KW)	Moteur pour vanne en V (MOT-5469) 10/05/2008 Qté : 1 Unité	☐
Vanne 3 voies (VAN-3V)	Qté : 50 Unité	☐

ANNULER ENREGISTRER

The data displayed on this list is as follows:

- **Name and code of the location of the item** to be inventoried (grouping).
- **Name and code of the item** to be inventoried.
- **Batch number of the item** to be inventoried (only for batch-managed items).
- **Serial number, name, and code of the asset** of the item to be inventoried (only for serialized items).
- **Use-by date** (for batch-managed or serialized items).
- **Quantity** in stock (before inventory).



The «Add an item» button enables users to take inventory of a new item in the previously selected location.

21.3.2. Taking inventory by item

21.3.2.1. Presentation

This inventory method enables users to select a stored item and take inventory of it in each of its storage locations.

21.3.2.2. Selecting the item to be inventoried

Selecting the «Taking inventory by item» option displays the list of catalog items.



Créer un inventaire spontané

Élément à inventorier

1

2

Élément à inventorier

Article

×

▼

Article

🔍 Rechercher

🔍

Catalogue article 7

^

 Filtre a air diametre 20
(FILTRE-AIR-D20)

 Gants de protection jetables
(GANTS)

 ITEM1

 Joint en V
(JOINTVR5)

 Moteur 10 kW
(MOT-ELEC-10KW)

Users should select the storage location in the warehouse of their choice.

The inventory will be carried out for the selected storage location.

21.3.2.3. Storage lines to be inventoried

Selecting the item serves to initialise the list of locations for the item to be inventoried.

Créer un inventaire spontané sur article

Réalisation de l'inventaire

Rechercher

Magasin 1

Allée 1 casier 10 (A1C10)
Qté : 0 Unité

Allée 1 casier 11 (A1C11)
Qté : 44 Unité

+ CHOISIR UN AUTRE EMPLACEMENT

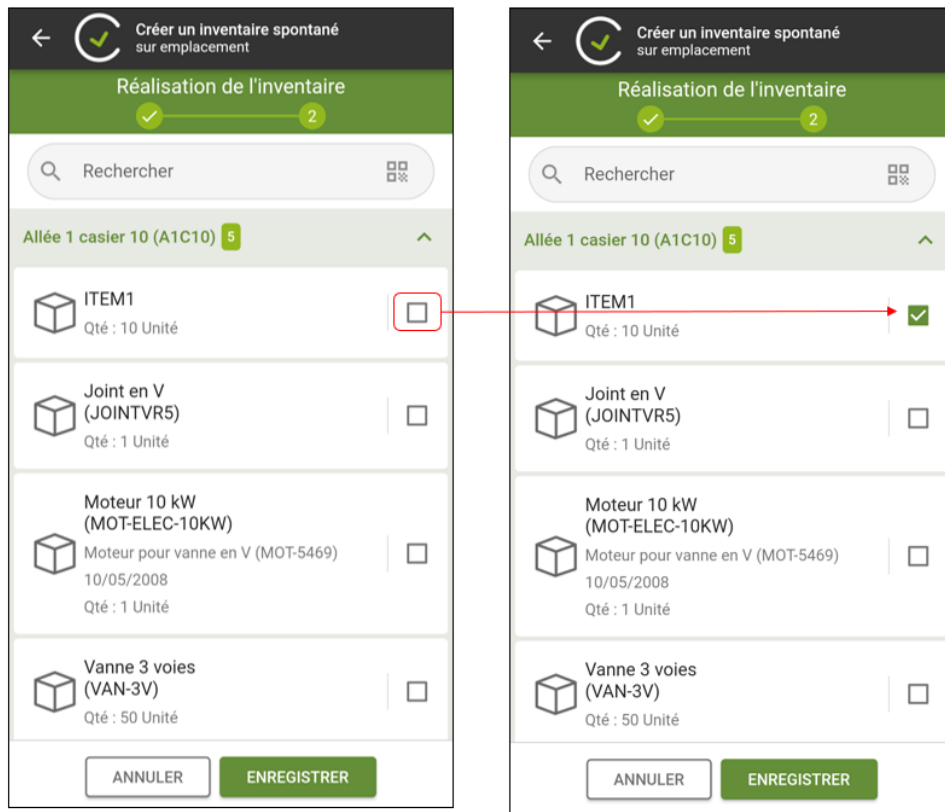
ANNULER ENREGISTRER

The data displayed on this list is as follows:

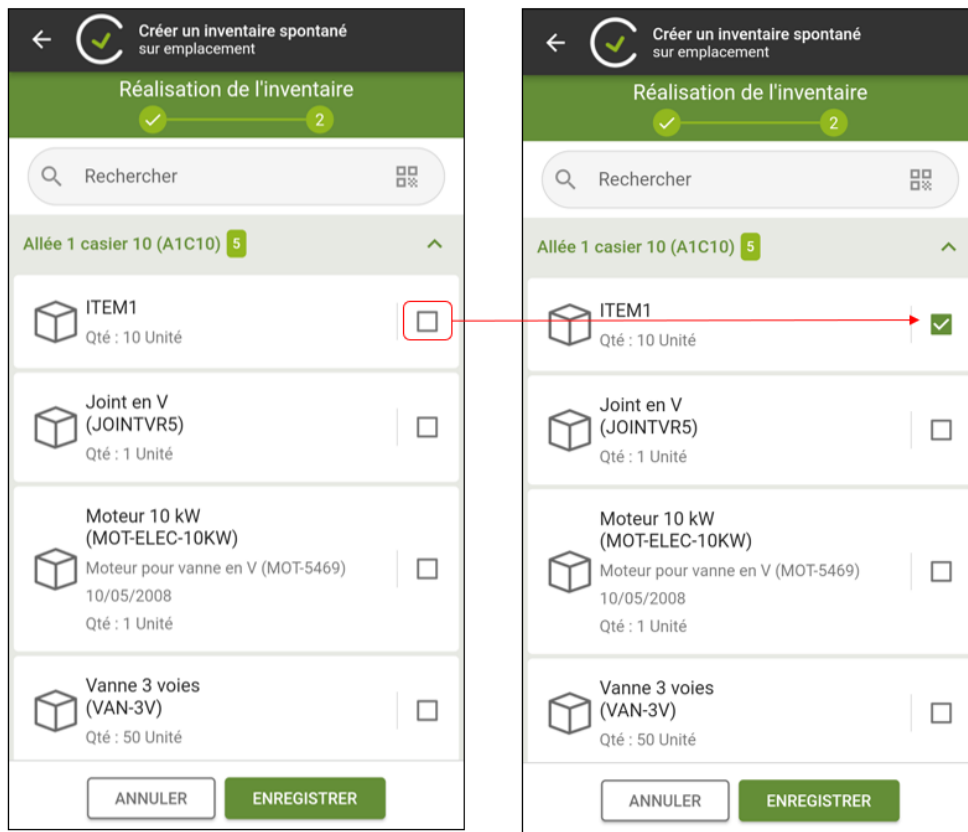
- **Name and code of the location of the item** to be inventoried (grouping).
- **Name and code of the item** to be inventoried.
- **Batch number of the item** to be inventoried (only for batch-managed items).
- **Name and code of the asset** for the item to be inventoried (only for serialized items).
- **Quantity** in stock (before inventory).

21.4. Taking inventory

If the inventoried quantity is equal to the quantity in stock, the user can simply check the box to the right of the «Quantity» button.



If the inventoried quantity differs from the quantity in stock, the user must access the details of the inventory line by selecting the «Quantity» button.



In the details of the inventory line, the following data is displayed:

- **Name and code of the item** to be inventoried.
- **Name and code of the inventory warehouse.**
- **Name and code of the inventory location.**

- **Batch number** (for batch-managed item).
- **Name and code of the asset** (for serialized items).
- **Use-by date**.
- **Expected quantity** (quantity of the item in stock at this location).
- **Inventoried quantity** (enter the inventoried quantity).
- **Inventory:** «Inventory» stock movement (hidden if there is only one inventory movement).
- **Technician:** Code of the technician carrying out the inventory (as default, that of the connected user).
- **Comment**.

Actions available on the detail form

- The **Save** button enables users to save the data entered in the inventory line details and to return to the list of inventory lines.
- The **Next** button enables users to save the data entered in the inventory line details and to display the details of the following inventory line.
- The **Cancel** button enables users to exit the inventory line without saving the data entered and to return to the list of detailed storage lines.

21.5. Finalizing the inventory

To finalise the inventory, users must **Save** the list of inventory lines.

Saving the inventory lines makes it possible to create as many inventory «movements» as there are inventory lines in this list.

The screenshot shows the 'Réalisation de l'inventaire' screen. At the top, there is a header bar with a back arrow, a green checkmark icon, and the text 'Créer un inventaire spontané sur emplacement'. Below this is a green bar with the title 'Réalisation de l'inventaire' and a progress indicator showing a green checkmark and the number '2'. Below the header is a search bar with the text 'Rechercher' and a grid icon. The main content area displays a list of inventory items, each with a cube icon, a title, a description, a date, a quantity, and a green checkmark in a box. The items are:

- Moteur 10 kW (MOT-ELEC-10KW)**
Moteur pour vanne en V (MOT-5469)
10/05/2008
Qté : 1 Unité
- Vanne 3 voies (VAN-3V)**
Qté : 50 Unité
- Roulement 120*260*55 NU 324J (RLT-12055)**
2131
10/05/2008
Qté : 8 Unité

At the bottom of the list is a green button with a plus icon and the text '+ AJOUTER UN ARTICLE'. Below the list are two buttons: 'ANNULER' and 'ENREGISTRER'.

Once the inventory lines have been saved, the inventory movements are created and can be viewed in the «Stock movements» function of CARL Touch.

Mouvements de...	
19/08/2022	5
	
Inventaire	
Type de mouvement: Inventaire (INVENTAIRE)	
Article: Roulement 120*260*55 NU 324J	
Magasin: Magasin 1 (MAG1)	
Emplacement: Allée 1 casier 10 (A1C10)	
N° de lot: 2131	
Quantité movimentée: 8 Unité	
	
Inventaire	
Type de mouvement: Inventaire (INVENTAIRE)	
Article: Vanne 3 voies (VAN-3V)	
Magasin: Magasin 1 (MAG1)	
Emplacement: Allée 1 casier 10 (A1C10)	
Quantité movimentée: 50 Unité	
	
Inventaire	
Type de mouvement: Inventaire (INVENTAIRE)	
Article: Moteur 10 kW (MOT-ELEC-10KW)	
Magasin: Magasin 1 (MAG1)	
Emplacement: Allée 1 casier 10 (A1C10)	
Matériel: Moteur pour vanne en V (MOT-5469)	
Quantité movimentée: 1 Unité	
	
Inventaire	
Type de mouvement: Inventaire (INVENTAIRE)	
Article: Joint en V (JOINTVR5)	
Magasin: Magasin 1 (MAG1)	
Emplacement: Allée 1 casier 10 (A1C10)	
Quantité movimentée: 1 Unité	
	
Inventaire	

22. PREPARED INVENTORIES FUNCTION

22.1. Purpose

The «Prepared inventories» function of CARL Touch provides a comprehensive response to mobile users' requirements in terms of managing prepared inventories: access to information, performance of prepared inventories, allocation transfers, etc.

In order to provide a response to all requirements relating to prepared inventories, CARL Touch offers all the following forms:

List of prepared inventories – main form providing access to both: *

- Prepared inventory details,
- and the List of prepared inventory lines
 - enabling access to the details of a prepared inventory line.

... with each form providing access to its own specific actions and information.

* depending on the status of the prepared inventory – see rules below.

22.2. List of prepared inventories

The list of prepared inventories enables users to browse and view all prepared inventories that are either «unassigned», shared or assigned to the current user.

These prepared inventories must have been created beforehand in CARL Source (it is not possible to create a prepared inventory from CARL Touch) and appear on the mobile device under «Validated» status.

Depending on the context, selecting a prepared inventory from the list may redirect the user to one of two different forms:

- If the prepared inventory has «New» or «Taken into account» status: CARL Touch displays the prepared inventory detail form (see [Prepared inventory details](#)).
- Otherwise: CARL Touch displays the list of prepared inventory lines (see [List of prepared inventory lines](#)).

22.2.1. Meaning of icons

The following icons may be shown on the list of prepared inventories:

Icon	Meaning
	New prepared inventory.
	Prepared inventory «Taken into account».
	Prepared inventory «Rejected».
	Prepared inventory «Started».
	Prepared inventory «Paused».

 Within their list, a CARL Touch user can have only one prepared inventory with «Started» status.

Icon	Meaning
	Prepared inventory «Finished».
	Prepared inventory «With conflict».

22.2.2. Data displayed

For each prepared inventory on the prepared inventories list, CARL Touch displays the following data subject to availability (i.e. a line is displayed only if the associated data has been entered):

- **Name and code of the prepared inventory.**
- **Name and code of the warehouse** subject to the prepared inventory.
- **Scheduled performance date** for the prepared inventory.
- **Inventory lines:** counter of prepared inventory lines presented in the form of *[Number of inventory lines already filled in]/[Total number of inventory lines]*

	If the prepared inventory relates to several warehouses, the wording "Multiple warehouses" or all codes for the warehouses concerned will be displayed in the Warehouse name and code area (depending on the available space).
---	---

	If the prepared inventory is shared, the following icon is displayed: 
--	---

22.2.3. Actions

CARL Touch proposes general actions on the list of prepared inventories form.

	If the available actions for a form cannot all be shown directly on the action bar, additional actions are accessible via the button: 
---	---

Actions available on the list of prepared inventories form

Button	Button action
	Search within the list of prepared inventories.
	Sort prepared inventories.

22.2.4. List of prepared inventories tabs

As default, there are no tabs on the list of prepared inventories: the display shows the list of prepared inventories that are «unassigned» or assigned to the user. However, depending on the context, up to three tabs may be displayed:

- **«MY IN-PROGRESS ITEMS» tab:** this tab is shown only if another tab («MY HISTORY» or «CONFLICTS») is displayed. The display shows the list of prepared inventories that are «unassigned» or assigned to the user.

- **«MY HISTORY» tab**: this tab contains the prepared inventories that have been «Completed» or «Rejected» by the user.
- **«CONFLICTS» tab**: this tab contains the prepared inventories for which a conflict has been detected.



The conflict display mechanism is described in section [Managing conflicts](#).

22.3. Prepared inventory details

22.3.1. Presentation

The prepared inventory detail form provides quick, structured access to the information comprising a prepared inventory, and enables these fields to be changed if necessary.

22.3.2. Access

The prepared inventory detail form is accessible:

- from the list of prepared inventories (by selecting a prepared inventory with «New» or «Taken into account» status),
- from the list of prepared inventory lines (by returning to the previous screen).

22.3.3. Data displayed



The data listed below corresponds to the structure of the «standard» form. CARL Touch forms are customizable, implying that the form structure may be different in your context.

The prepared inventory detail form contains the following:

«General» block

- **Issued by**: agent who created the prepared inventory.
- **Scheduled performance**: scheduled performance date for the prepared inventory.
- **Assigned to**: agent appointed to perform the prepared inventory.
- **Note number** for the prepared inventory.

«Performance» block

- **Warehouse**: name and code of the storage warehouse affected by the prepared inventory.
- **Person in charge** of the prepared inventory.
- **Organization** of the prepared inventory.
- **Comment** associated with the prepared inventory.
- **Performance comment** associated with the prepared inventory.



If the prepared inventory relates to several warehouses, the wording «Multiple warehouses» or all codes for the warehouses concerned will be displayed in the **Warehouse** area (depending on the available space).



The button is used to add/edit the comment.

«Inventory lines» block

- **Line(s) remaining to be inventoried**: number of prepared inventory lines whose «*Inventoried quantity*» is still to be completed.
- **[x] Location(s) of [y]** – Indicators relating to locations, where:
 - [x]: is the number of locations remaining to be checked (i.e. locations for which there is still at least one prepared inventory line to be completed).

- [y]: is the total number of locations to be checked.



The  button is used to access the **list of prepared inventory lines**, described in *section [List of prepared inventory lines](#)*.

«Documents» block

- **Number of documents relating to the prepared inventory.**



The  button is used to add/edit documents relating to the prepared inventory.

Further details about document management are given in *section [Managing linked documents](#)*.

22.3.4. Actions

CARL Touch proposes general actions on the prepared inventory detail form, as well as actions specific to a prepared inventory.



If the available actions for a form cannot all be shown directly on the action bar, additional actions are accessible via

the button:



Actions available on the prepared inventory detail form

As the actions located at the bottom of the screen are common to those on another form, they are described in *section [Available actions](#)*.

22.4. List of prepared inventory lines

22.4.1. Presentation

The list of prepared inventory lines enables users to browse the prepared inventory lines and to perform this inventory by entering the quantity inventoried as being physically in stock for each line.

22.4.2. Access

The list of prepared inventory lines is accessible:

- From the « *Inventory lines* » block of the prepared inventory detail form,
- From the list of prepared inventories (by selecting a prepared inventory with «Started» or «Paused» status).

22.4.3. Data displayed

For each prepared inventory line on the list of prepared inventory lines, CARL Touch displays the following data subject to availability (i.e. information is displayed only if the associated data has been entered):

- **Item:** name and code of the item to be inventoried.
- **Warehouse:** name and code of the warehouse affected by the prepared inventory line.
- **Batch:** batch number (for a batch-managed item).
- **Asset:** name and code of the asset.
- **Serial number** of the asset of the item to be inventoried (only for serialized items).
- **Use-by date** (for a batch-managed or serialized item).

In addition to this data, the two buttons described below are also displayed.

22.4.4. «Quantity» and «Check» buttons, and performance dynamic

The "Quantity" and "Check" buttons play a central role in carrying out a prepared inventory: they signify the checking of each prepared inventory line.

22.4.4.1. Function of the «Quantity» button

- As default, this button displays the «expected» quantity in stock in the inventoried location (information originates from CARL Source).
- This button is clickable only if the current prepared inventory is « **Started** ».
- A single click on the button displays the **detail form for a prepared inventory line** and enables the data to be changed (see [Details of a prepared inventory line](#)).

If the user manually changes the contents of the « **Quantity inventoried** » field of the detail form for the prepared inventory line and confirms the change:

1. CARL Touch returns to the list of prepared inventory lines,
2. The quantity entered by the user is displayed on the « *Quantity* » button of the prepared inventory line.
3. The  «Check» button icon for the line turns green, indicating that the line has been checked (see details below).

22.4.4.2. Function of the «Check» button

- This button is clickable only if the current prepared inventory is « **Started** ».
- The icon associated with this button is used to **visually determine whether the «Quantity inventoried» has already been checked/entered** for the current prepared inventory line:
 - If the «Quantity inventoried» has not yet been checked:  icon (grey).
 - If the «Quantity inventoried» has been checked:  icon (green).
- **During the performance of the prepared inventory:**
 - As default, this button appears with a  icon (grey).
 - If the quantity found by the user to be physically in stock **corresponds** to the «expected» quantity as per CARL Touch, the user can click directly on the  button:
 1. CARL Touch then automatically initialises the « **Quantity inventoried** » value using the « **Expected quantity** ».
 2. The « *Check* » button turns green ,
 3. and the line is considered to have been **checked**.
 - Conversely, the user can **invalidate** a checked line by clicking on the  button:
 1. CARL Touch automatically reinitialises the « **Quantity inventoried** » to [zero].
 2. CARL Touch again displays the "**Expected Qty**" on the "*Quantity*" button (reminder: The this information originates from CARL Source),
 3. The « *Check* » button turns grey again .
 4. And the line is **no longer considered** to have been **checked**.

22.4.4.3. Performance help: adapting grouping blocks

Once all prepared inventory lines contained within a grouping block have been checked/inventoried (i.e. when all these lines have been ticked ), the grouping block **collapses automatically** and **turns grey**.



This mechanism results in a **clearer display** and it is therefore easier for users to see the **work remaining to be completed**.

If the prepared inventory lines are sorted by location, this «collapse block» mechanism enables users to see at a glance that the work for one location is complete and that they can move on to another location.



The sort and grouping blocks mechanism is described in section [Sort criteria and grouping blocks](#).

22.4.5. Actions

CARL Touch proposes general actions on the detail form for prepared inventory lines, as well as actions specific to a prepared inventory line.



If the available actions for a form cannot all be shown directly on the action bar, additional actions are accessible via the button:



Actions available on the list of prepared inventory lines form (action bar)

Button	Button action
	Sort prepared inventory lines.
	Scan via RFID tag.

Context-sensitive actions available on a prepared inventory line

The context-sensitive actions associated with a prepared inventory line are accessible via the  button located to the right of the prepared inventory line.

Button	Button action
Add a batch	Used to add a batch (for batch-managed items). - See additional information in section A closer look: Adding a batch (for a batch-managed item) .
Add an asset	Used to add an asset (for a serialized item). - See additional information in section A closer look: Adding an asset (for a serialized item) .

Actions available on the list of prepared inventory lines form

As the actions located at the bottom of the screen are common to those on another form, they are described in section [Available actions](#).

22.4.6. A closer look: Adding a batch (for a batch-managed item)

The « Add a batch » action is one of the context-sensitive actions available for a prepared inventory line, if the line relates to batch-managed items – see [Actions](#).

This action is useful in the following scenario:

A user performs the inventory for a prepared inventory line relating to batch-managed items. During this operation, if the user observes:

- that the **batch number** of the inventoried item **does not feature on the list** of inventory lines,

- **OR** that **this batch number differs from the batch number indicated on the prepared inventory line** for the «Warehouse/Location/Item» combination checked,

... then they must **declare the new batch number** via CARL Touch.

- The context-sensitive « *Add a batch* » action enables the user to enter this batch number.

Selecting this action opens the detail form of the inventory line (see [Details of a prepared inventory line](#)) and enables the user to enter:

- A **batch number**.
- A **quantity** inventoried.
- A **use-by date**.
- And any **comments**.

Once the user has confirmed the data entered (and on completion of several checks), CARL Touch records the new prepared inventory line and adds it to the list of prepared inventory lines.

If necessary, the user can change their mind and decide to delete the newly added line – see [A closer look: Deletion of a prepared inventory line](#).

22.4.7. A closer look: Adding an asset (for a serialized item)

The « *Add an asset* » action is one of the context-sensitive actions available for a prepared inventory line, if the line relates to a serialized item – see [Actions](#).

This action is useful in the following scenario:

A user performs the inventory for a prepared inventory line relating to a serialized item. During this operation, if the user observes:

- that the **asset** inventoried **does not feature on the list** of inventory lines,
- **OR** that **this asset code differs from the asset code indicated on the prepared inventory line** for the «Warehouse/Location/Item» combination checked,

... then they must **declare the new asset** via CARL Touch.

- The context-sensitive « *Add an asset* » action enables the user to declare this asset code.

Selecting this action opens the detail form of the inventory line (see [Details of a prepared inventory line](#)) and enables the user to enter:

- An **asset** (via the "Asset" button),
- A **use-by date**.
- And any **comments**.

Once the user has confirmed the data entered (and on completion of several checks), CARL Touch records the new prepared inventory line and adds it to the list of prepared inventory lines.

If necessary, the user can change their mind and decide to delete the newly added line – see [A closer look: Deletion of a prepared inventory line](#).

22.4.7.1. Focus: RFID Last inventory

By clicking the RFID scan button, the user initiates bulk last inventory via RFID.

The user can then scan the RFID tags with the reader. With each scan, the status of the scanned asset automatically turns green and is displayed at the top of the list.

22.4.7.2. A closer look: Deletion of a prepared inventory line

If necessary, the user can delete a prepared inventory line added previously via the « *Add a batch* » or « *Add an asset* » action (see [A closer look: Adding a batch \(for a batch-managed item\)](#) and [A closer look: Adding an asset \(for a serialized item\)](#)).

To do so, simply slide to the left the prepared inventory line previously added and select the  icon: CARL Touch proposes to delete the line and requests confirmation.

If the user confirms the deletion: the prepared inventory line is deleted.

22.5. Details of a prepared inventory line

22.5.1. Presentation

The prepared inventory detail form provides quick, structured access to the information comprising a prepared inventory line, and enables these fields to be changed if necessary.

22.5.2. Access

The detail form for a prepared inventory line is **accessible from the list of prepared inventory lines**, and only for a prepared inventory with « **Started** » status:

- From the «Quantity» button of a prepared inventory line (see [Function of the «Quantity» button](#)),
- From the «Add a batch» action (see [A closer look: Adding a batch \(for a batch-managed item\)](#)).
- From the «Add an asset» action (see [A closer look: Adding an asset \(for a serialized item\)](#)).

22.5.3. Data displayed



The data listed below corresponds to the structure of the «standard» form. CARL Touch forms are customizable, implying that the form structure may be different in your context.

The prepared inventory line detail form contains the following:

- **Item**: name and code of the item to be inventoried.
- **Warehouse**: name and code of the warehouse affected by the prepared inventory line.
- **Location**: name and code of the location affected by the prepared inventory line.
- **Batch ***: batch number.
- **Asset ***: name and code of the asset.
- **Expiration ***: use-by date.
- **Expected quantity**: «expected» quantity in stock at the inventoried location.
- **Qty recorded**: quantity actually found to be in stock at the inventoried location.
- **«Copy quantity» button**  : automatically copies the value in the « *Expected quantity* » field to the « *Quantity inventoried* » field.
- **Agent** affected by the stock movement.
- **Comment** associated with the prepared inventory line.



- The **Expected quantity** field originates from CARL Source.
- The "**Copy quantity**" button is displayed only if the "Expected quantity" field initially contains a value.
- The button associated with the **Agent** field is used to select an agent.
- The  button is used to add/edit a comment.



* This data can be entered only in the event of «Add a batch» (see [A closer look: Adding an asset \(for a serialized item\)](#)) or «Add an asset» (see [A closer look: Adding an asset \(for a serialized item\)](#)) actions.

22.5.4. Actions

CARL Touch proposes general actions on the detail form for prepared inventory lines, as well as actions specific to the fields of a prepared inventory line.

Actions available on the prepared inventory line detail form

The actions below are shown at the bottom of the screen when the prepared inventory line detail form is displayed:

Button	Button action
	Cancel the data entered.
	Save the data entered.
	Save the data entered and immediately continue with the detailed information of the following prepared inventory line (without having to return to the list of prepared inventory lines).  This button also results in the Agent and Comment of the current line being copied automatically to the following prepared inventory line. This avoids the need for users to systematically re-enter the same comment on all lines for a location: the comment is entered once only and is then copied automatically from one line to the next.

22.6. Available actions

The actions below are located at the bottom of the screen and are available:

- for the **detail form** of an **unshared** prepared inventory,
- and for the **list of lines** of an **unshared** prepared inventory.

Button	Name	Button action
	«I accept»	The prepared inventory is «Taken into account» by the user.  • When a user takes a prepared inventory into account, they become the only user to keep this prepared inventory in their list (i.e. the prepared inventory is no longer shown on other users' mobile devices). • From the point of view of CARL Source, the user is recorded in the «Assigned to» field on the prepared inventory.

Button	Name	Button action
	«Reject»	The prepared inventory is «Rejected» by the user.  - When the user rejects a prepared inventory, it is re-dispatched to all users to whom it was originally addressed. See Rules for distributing prepared inventories between users for the prepared inventories dispatch rules. - The possibility of rejecting a prepared inventory depends on the settings set in the user's profile. - A prepared inventory that is rejected will be shown in the «My History» tab for the list of prepared inventories: it may be «Taken into account» at a later stage if necessary.
	«Start»	The prepared inventory is «Started».  - Within their list, a CARL Touch user can have only one prepared inventory with «Started» status. - Consequently, when the user selects the «Start» action, CARL Touch checks that no other prepared inventory has «Started» status: if this is the case, the status of the prepared inventory started previously is automatically changed to «Paused».
	«Pause»	The prepared inventory is «Paused».  Depending on the user's profile settings, the user may be required to enter a «Reason for pausing» when this action is selected.
	«Transfer»	The prepared inventory is transferred to another user.  This button is available for prepared inventories that are «Started» or «Paused».
	«Finish»	The prepared inventory is «Finished».  A prepared inventory that is finished will be shown in the «My History» tab for the list of prepared inventories.

The actions below are located at the bottom of the screen and are available:

- for the **detail form** of an **unshared** prepared inventory,
- and for the **list of lines** of a **shared** prepared inventory.

Button	Name	Button action
	«Start»	The prepared inventory is «Started».  - Within their list, a CARL Touch user can have only one prepared inventory with «Started» status. - Consequently, when the user selects the «Start» action, CARL Touch checks that no other prepared inventory has «Started» status: if this is the case, the status of the prepared inventory started previously is automatically changed to «Paused».

Button	Name	Button action
	«Pause»	The prepared inventory is «Paused».  Depending on the user's profile settings, the user may be required to enter a «Reason for pausing» when this action is selected.
	«Transfer»	The prepared inventory is transferred to another user.  This button is available for prepared inventories that are «Started» or «Paused».
	«Finish»	The prepared inventory is «Finished».  A prepared inventory that is finished will be shown in the «My History» tab for the list of prepared inventories.

22.7. Rules for distributing prepared inventories between users

When a new prepared inventory is created in CARL Source, it is distributed to CARL Touch users. The following rules determine which user(s) receive the new prepared inventory on their mobile device:

When a new prepared inventory is created in CARL Source, it is dispatched in the following order of priority:

- To the « *mobility* » agent specified in the « *Assigned to* » field of the prepared inventory.

OR if not (*i.e. if there are no «mobility» agents entered in the «Assigned to» field of the prepared inventory*):

- to the «mobility» agent entered in the «Scheduled assignments» table of the prepared inventory.

OR if not (*i.e. if there are no «mobility» agents entered in the «Scheduled assignments» table of the prepared inventory*):

- to all "mobility" actors if the "Assigned to all" checkbox of the prepared inventory is checked

OR if not (*i.e. if the «Assigned to all» checkbox of the prepared inventory is not checked*):

- To the « *mobility* » agent entered in the « *Person in charge* » field of the prepared inventory.

OR if not (*i.e. if no «mobility» agent is specified in the «Assigned to» field of the prepared inventory and no mobility manager is specified*):

- To « *mobility* » agents whose manager is the «non-mobile» agent in charge of the prepared inventory.

OR if not (*i.e. if none of the above conditions can be met*):

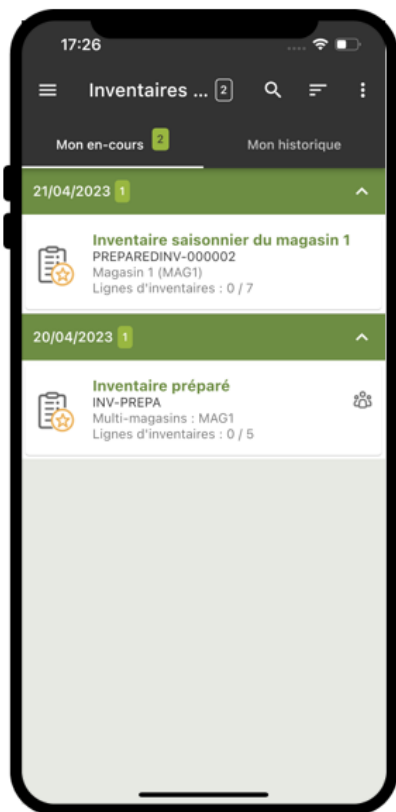
- To all « *mobility* » agents whose profile authorizes the transmission of non-assigned prepared inventories. *

* A «mobility» agent is an agent that is linked to a user and for which the «Mobility» box is checked. We assume here that *each user has at least the right to change* the prepared inventory.

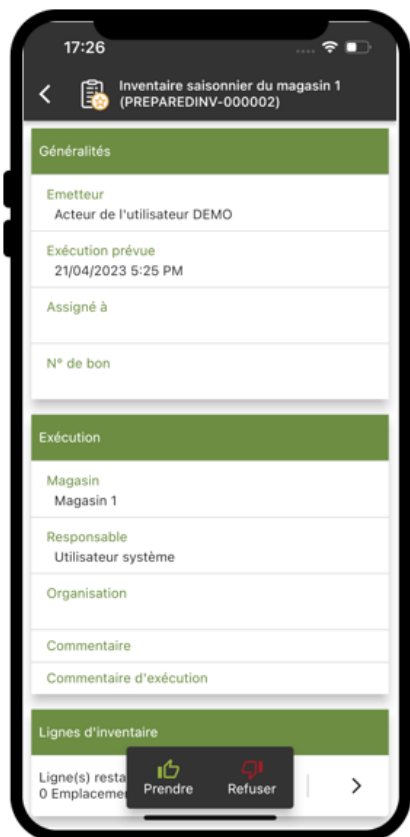
22.8. Usage case – Creating a prepared inventory

A prepared inventory is created in several steps, as described below:

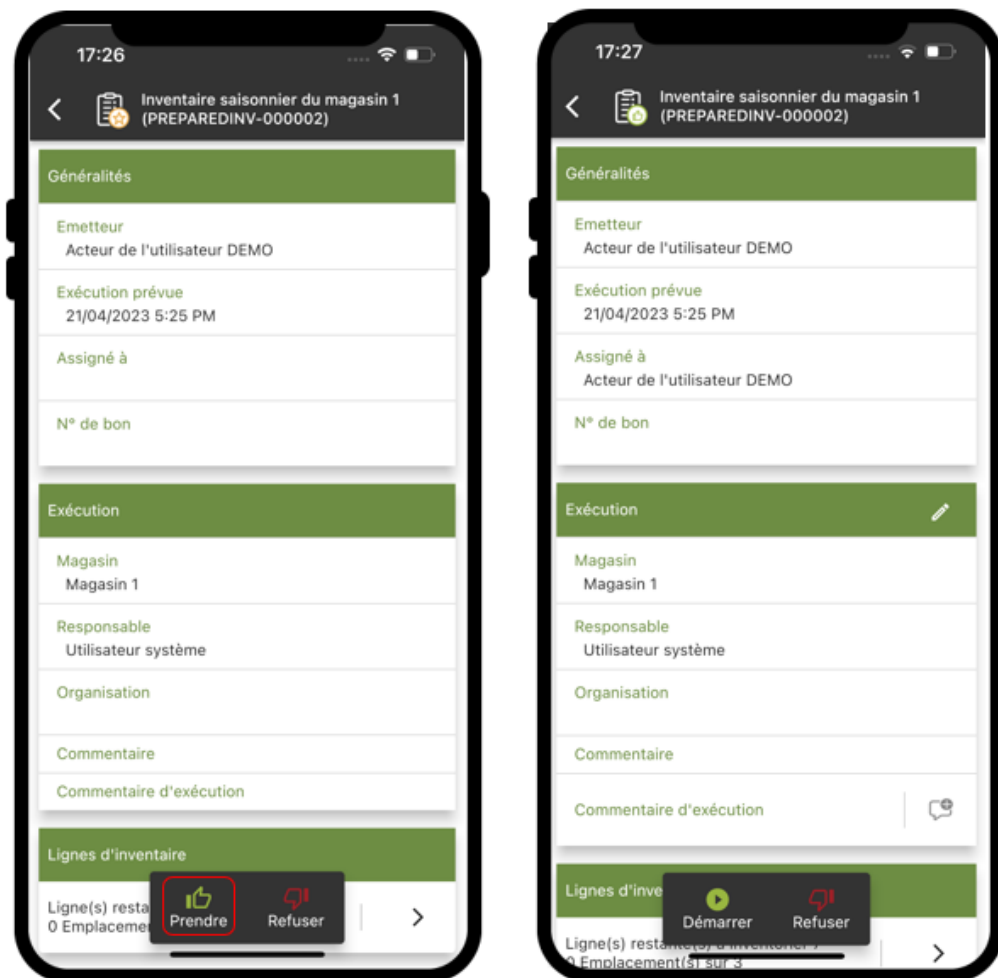
1. The CARL Touch user receives prepared inventories that have been assigned to him or that have not been assigned to anyone.



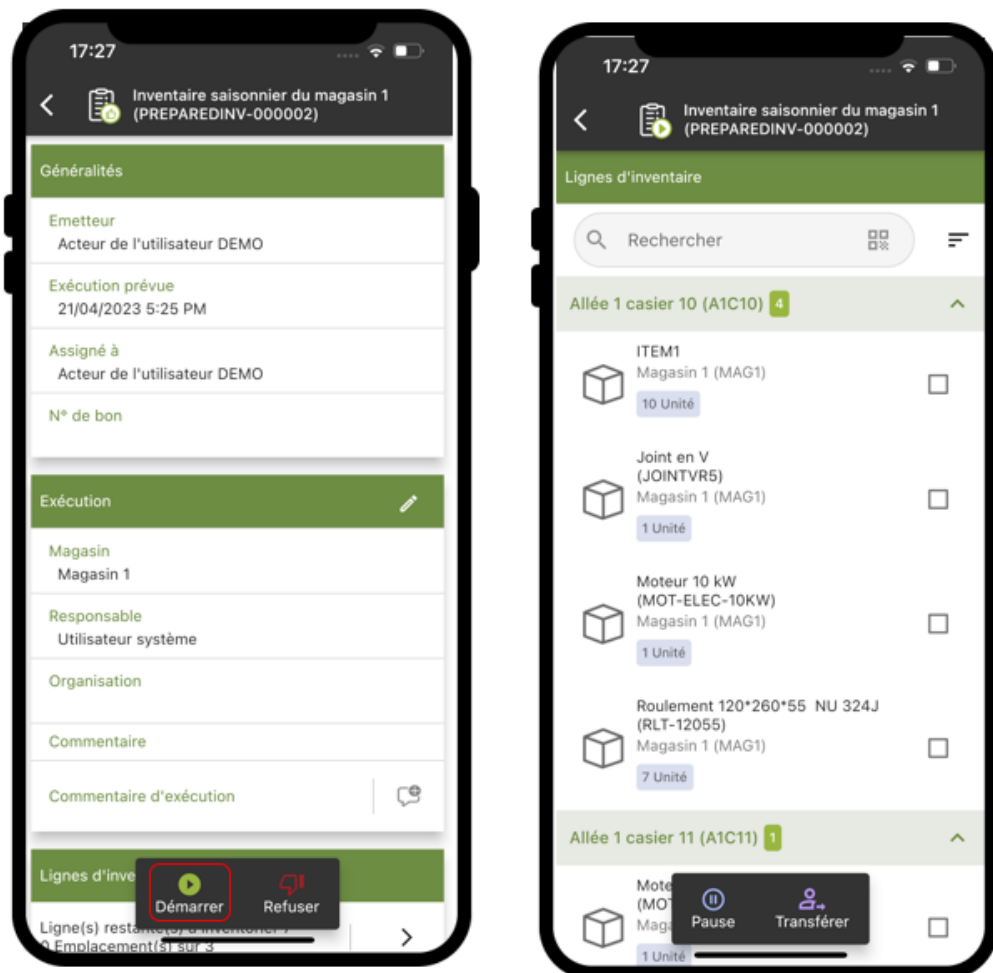
2. The user accesses the details of the prepared inventory to view the content. For an unshared prepared inventory, the user can then accept or reject the prepared inventory by selecting the «I accept» or «Reject» actions.



3. When the user takes the unshared prepared inventory into account, the inventory is assigned to the user and it is no longer shown on the list for other CARL Touch users. If the prepared inventory is shared, it always appears in the list of other users.



4. When the user is ready to take inventory of the first item, they must select « **start** ». CARL Touch automatically opens the list of prepared inventory lines remaining to be inventoried.



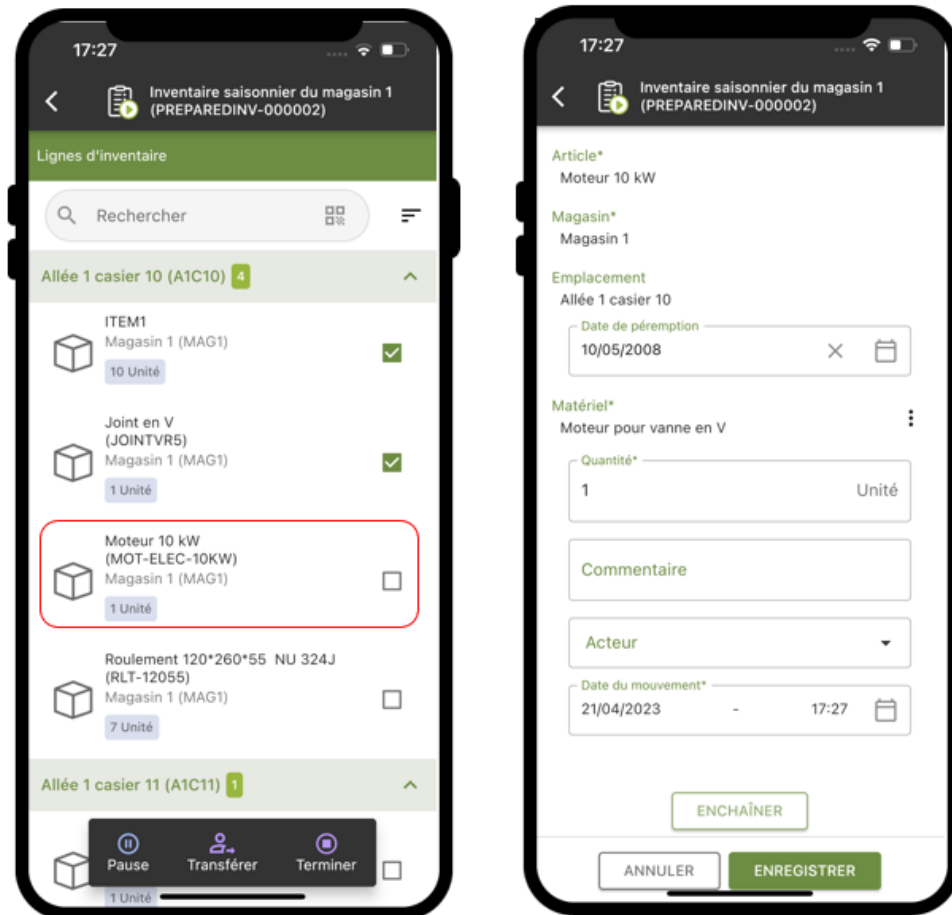
The inventory lines are grouped by storage location.

5. The user starts to take inventory of each prepared inventory line.

If the quantity inventoried is equal to the quantity in stock proposed in italics on the «Quantity» button, the user can simply tick the line.



If the quantity inventoried differs from the quantity in stock proposed in italics on the «Quantity» button, the user must access the details of the inventory line.

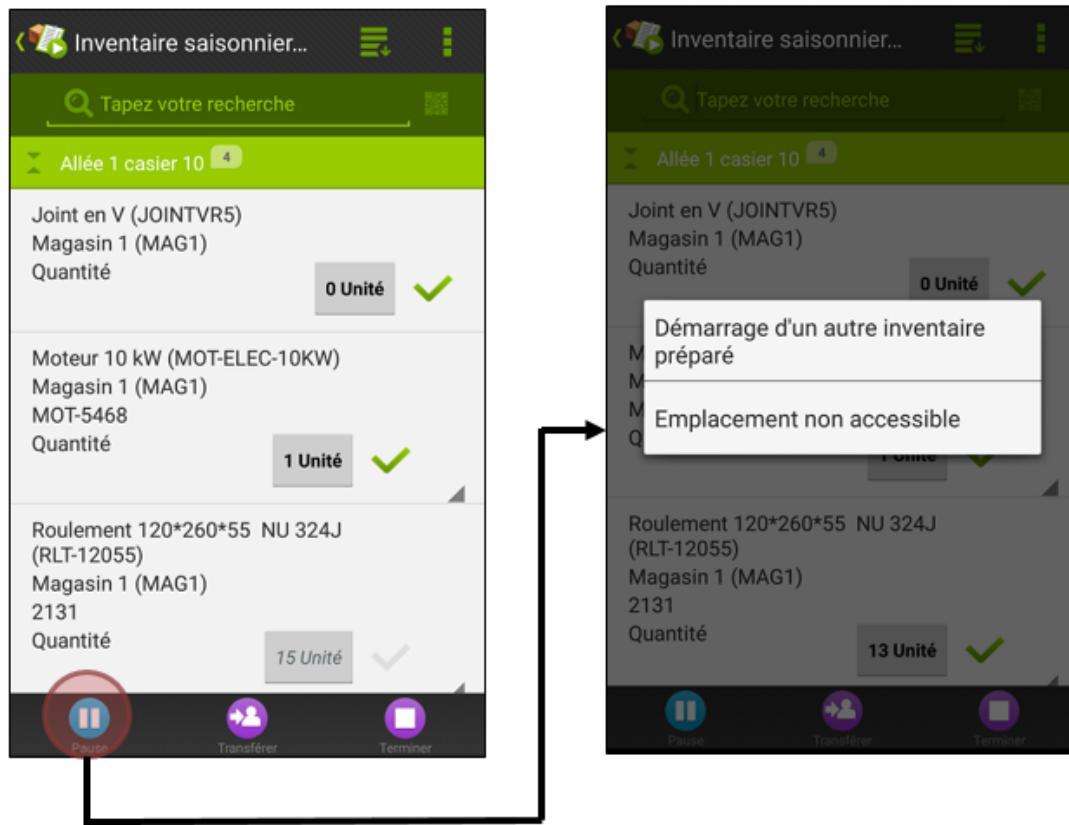


In the prepared inventory detail form, the user can complete the «Quantity inventoried» field.

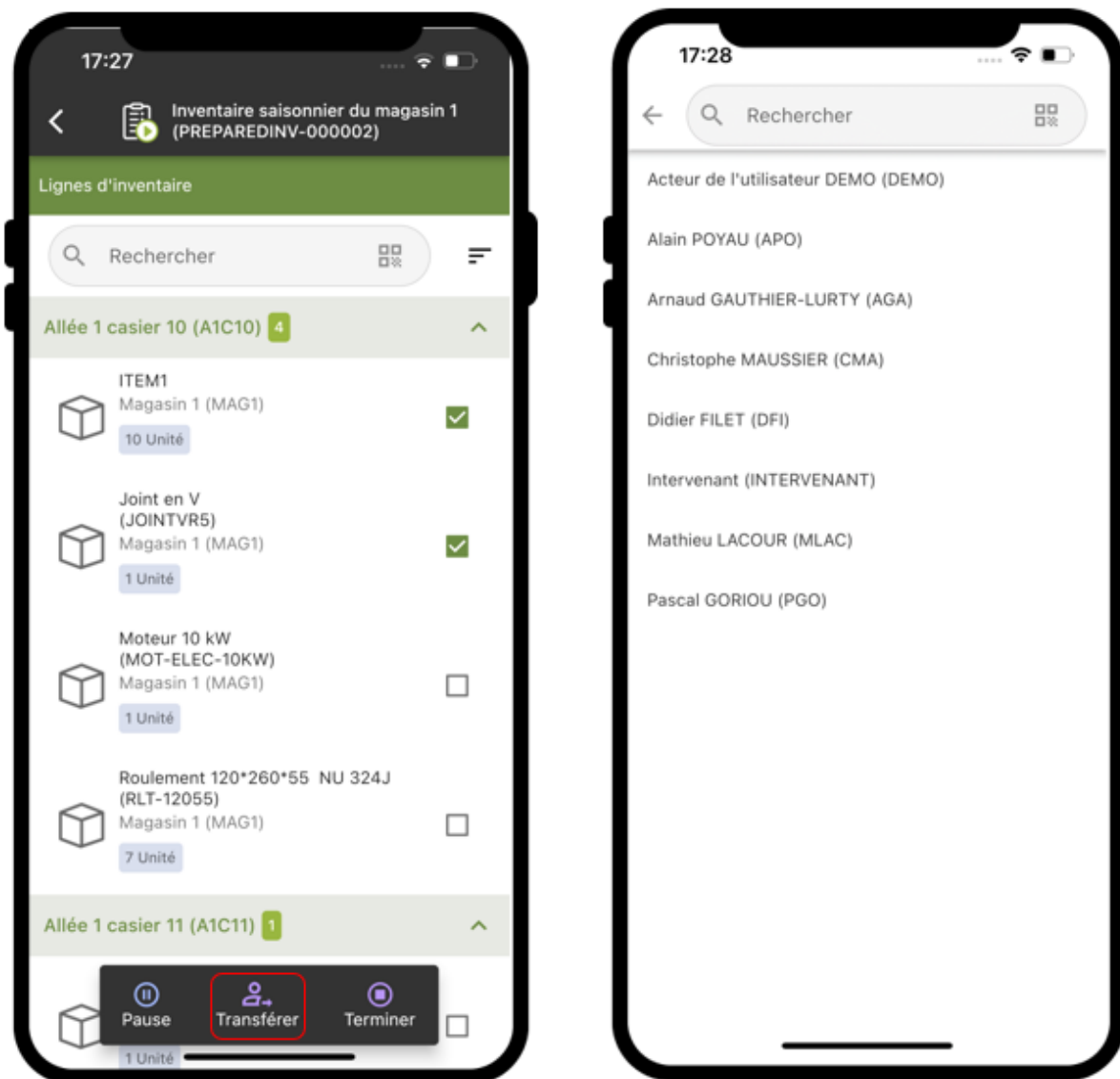
From this inventory line detail screen, the user can choose from the following three actions:

- **"Save"**: This action saves the data entered for the inventory line, closes the inventory line detail form, and redisplay the list of inventory lines.
- **"Next »"**: This action saves the data entered for the inventory line and displays the detail form for the next inventory line.
- **"Cancel »"**: This action, which requires confirmation, enables the user to return to the list of inventory lines without saving the data entered.

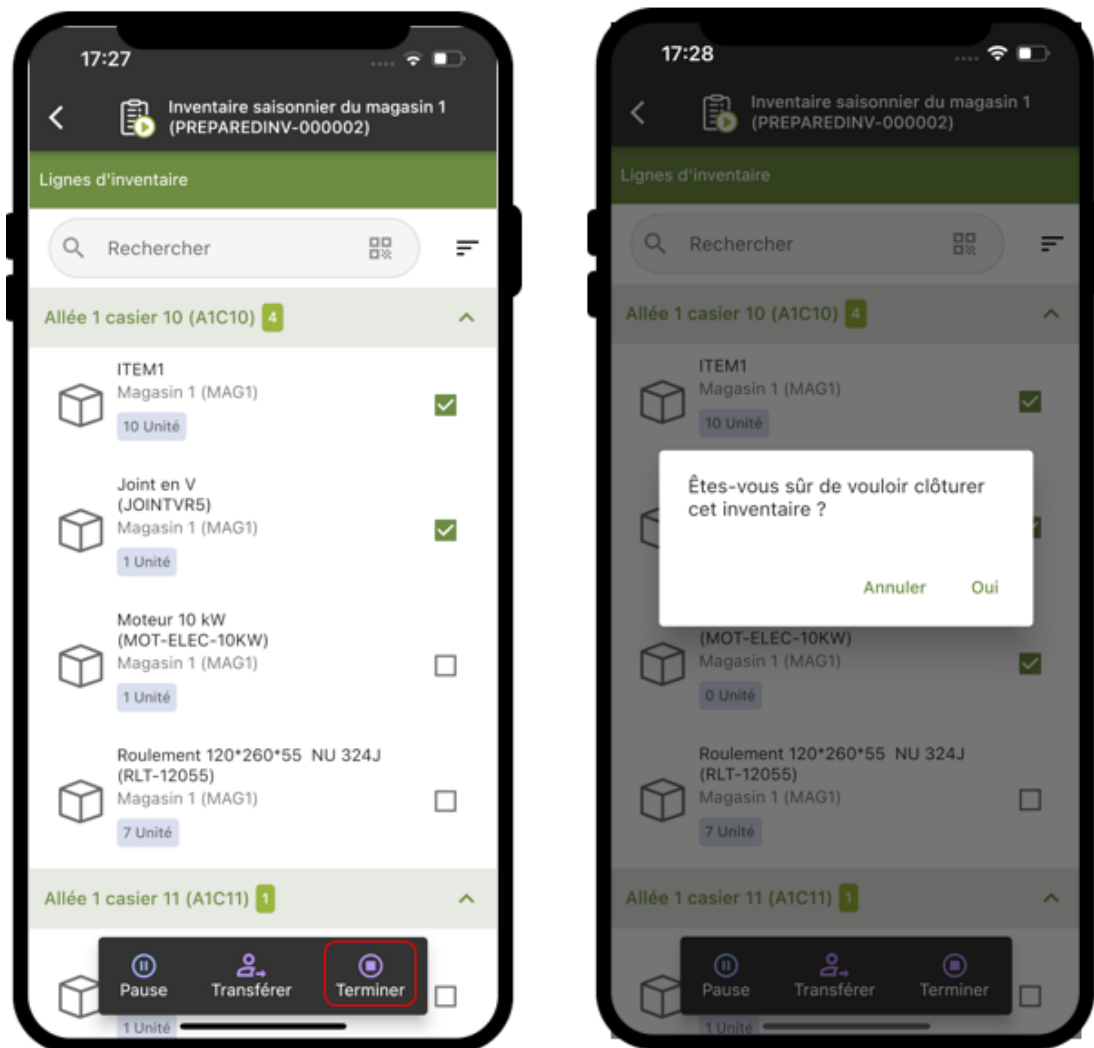
6. The user can pause the prepared inventory by specifying a reason for pausing (option defined in the user profile).



7. The user can transfer the prepared inventory to another user. To do so, the « **Transfer** » action must be selected.



8. The user completes the prepared inventory by selecting the "**Finish**" action. The «Finish» action is available even if some prepared inventory lines have not been checked.



This action closes the unshared prepared inventory. Shared prepared inventories are not closed in CARL Touch. This action will be performed in CARL Source.

The terminated inventory is displayed in the "**My History**" tab.



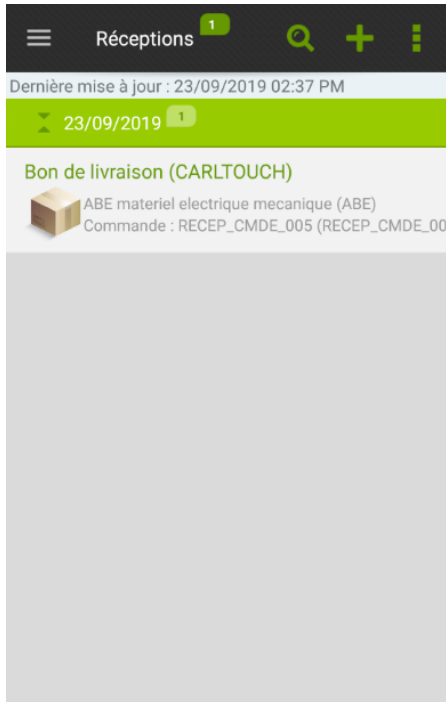
23. RECEIVING FUNCTION

23.1. Purpose

The "Receiving" function is used to manage receiving and purchase entries from CARL Touch.

23.2. List of delivery notes

This screen displays the list of delivery notes generated from the mobile terminal since the last synchronization.



23.2.1. Data displayed

For each delivery note, CARL Touch displays the following data subject to availability (i.e. a line is displayed only if the associated data has been entered):

- **Delivery note number.**
- **Name and code of the supplier** associated with the delivery note.
- **Order code or PR or WR** associated with the delivery note.

23.2.2. Actions

CARL Touch proposes general actions on the form for the list of delivery notes.

Actions available on the form for the list of delivery notes

Button	Button action
	Search within the list of delivery notes.
	Creation of a delivery note

23.2.3. Tabs of the list of delivery notes

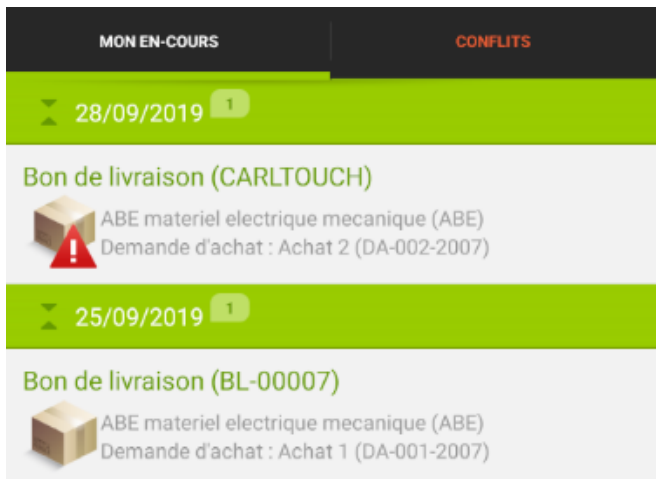
As default, there are no tabs on the list of delivery notes: it displays the list of current delivery notes. However, depending on the context, up to two tabs may be displayed:

- **«MY IN-PROGRESS ITEMS» tab:** This tab is shown only if another tab is displayed. It contains the list of current delivery notes.
- **«CONFLICTS» tab:** this tab contains the delivery notes for which a conflict has been detected.



The conflict display mechanism is described in section [Managing conflicts](#).

Illustration: List of delivery notes when both tabs are displayed



23.3. Details of a delivery note

23.3.1. Presentation

The detail form of a delivery note can be accessed from the list of delivery notes. It does not allow the data to be changed.

23.3.2. Data displayed



The data listed below corresponds to the structure of the «standard» form. CARL Touch forms are customizable, implying that the form structure may be different in your context.

The delivery note detail form contains the following:

Bon de livraison (BL001)	
Généralités	
Code	BL001
*Réceptionné par	Acteur de l'utilisateur DEMO
Date de livraison	23/09/2019
Commentaires	
Commentaire	
Documents	
0 document(s) lié(s) à la livraison	>
Réceptions	

«General» block

- Delivery note **Number**.
- **Received by** the technician.
- **Delivery date**.

«Comments» block

- **Comment**.

«Documents» block

- **Number of documents linked to delivery note**.



The  button is used to display documents linked to the delivery note.

Further details about document management are given in *section [Managing linked documents](#)*.

"Received" block

- **Number of lines received for the delivery note**.



The  button is used to display the lines received for the delivery note.

23.4. Creation of a delivery note

23.4.1. Receiving search criterion

The receiving search criterion is a prerequisite step for starting the "Receiving" wizard. This step requires the user to choose the origin of the receiving from those offered by CARL Touch:

- **Purchase order**.
- **Purchase request**.
- **Transfer request**.

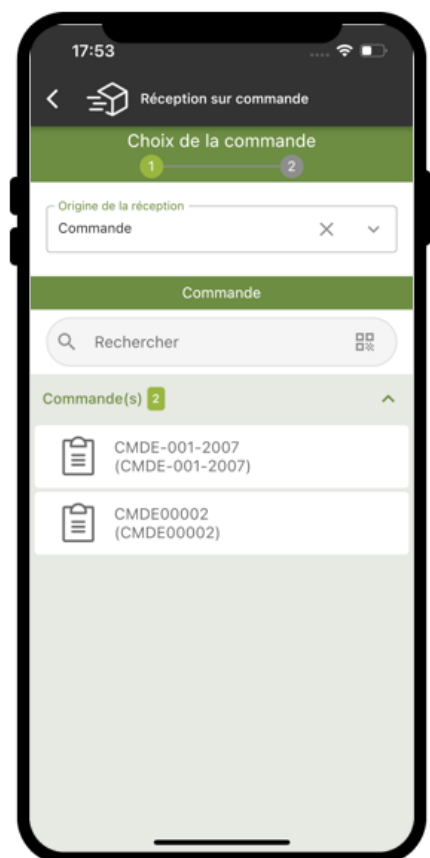
- **Supplier.**

The user's choice leads to the next step in the wizard.

23.5. Step 1 – Choice of order, purchase request, transfer request, supplier

23.5.1. Presentation

This step allows users to choose where it was received from: purchase order, PR, WR or supplier.



This choice is made from a list offered by CARL Touch (the contents of the list depend on the selected criterion):

Selected criterion	Information displayed by CARL Touch
<i>Purchase order</i>	CARL Touch displays list of orders with a status of Issued, Partially Received, accessible to the user.
<i>Purchase request</i>	CARL Touch displays the list of purchase requests with a status of To be Processed and Receipt, accessible to the user.
<i>Transfer request</i>	CARL Touch displays the list of transfer requests with at least one shipment in progress.
<i>Supplier</i>	CARL Touch displays the list of suppliers with orders and PRs having the status mentioned above, accessible to the user.

23.5.2. Actions

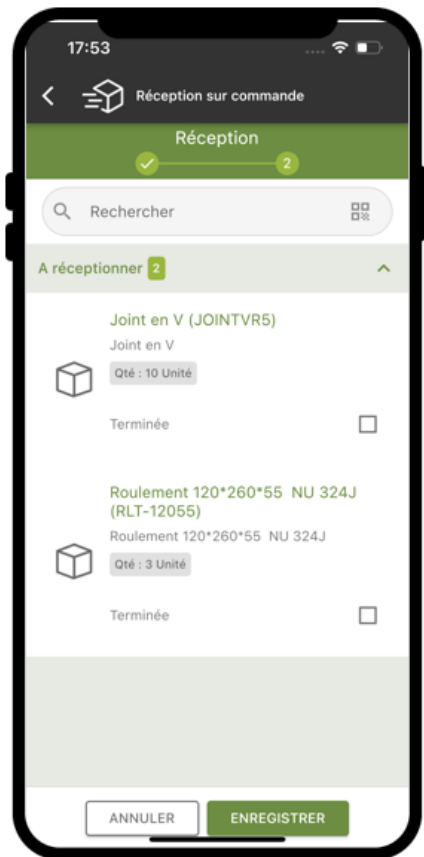
Next step in the wizard

Selecting a PO, a PR, a WR, or a supplier leads to the next step in the wizard.

23.6. Step 2 – Receiving

23.6.1. Presentation

This step allows the user to select received items.



23.6.2. Data displayed

This step presents the lines associated with the entity selected in step 1.

Only lines to be received or with partial receipt are shown.

Each line of this list presents the following information:

- **Name and code of the item**
- **Supplier reference**
- **Quantity received and Expected (or ordered) quantity**

23.6.3. Actions

Accessing details

Selecting a line gives access to the line's details.

An enabled Completed box  also leads to the details if the item is managed in inventory and if the item is not in delivery check.

RFID Receiving

By clicking on the RFID icon, the user can (if an RFID reader has been paired with the mobile device) scan an RFID tag directly.

Receipt of the asset identified with this label will be processed. The checkbox will be selected, and the item entry wizard will open.

Delivery note access

The  button gives access to delivery note information.

23.7. Receipt line details

23.7.1. Presentation

The details are used to edit and complete the receipt line information.

23.7.2. Data displayed

This step presents details on the lines received.

17:53

Commande
CMDE00002

Article

Joint en V (JOINTVR5)

Qté commandée 10 Unité
Reste à livrer 10 Unité

Qté réceptionnée* 10 Unité

Terminée ☐

Entrées en stock

+ AJOUTER UNE ENTRÉE

Litige

Qté en litige 0 Unité

Litige

RÉINITIALISER

ANNULER ENREGISTRER

The detail form of a received line contains the following:

- **Name and code of the item**
- **Quantity ordered**
- **Remaining to be delivered**
- **Quantity received**
- **Completed** allowing for notification that the line has been completely received

23.7.2.1. Stock Entry block

Entrées en stock

Magasin 1 (MAG1) ...

Allée 1 casier 11 (A1C11)

Date de péremption 01/09/2019

Code du matériel
MAT001

N° de série
001002003

For a stock-managed, batch-managed, or serialized item, a Stock Entry block is displayed:

- **Name and code of the warehouse**
- **Name and code of the location**
- **Qty to enter**
- **Batch** (for a batch-managed item)
- **Use-by date** (for a batch-managed or serialized item)
- **Asset code** (for a serialized item)
- **Serial number** (for a serialized item)
- **Adding an entry** button



If there is a single warehouse location defined for the item, the warehouse code and location are initialized to those values. However, it may be changed.



If the purchase unit is different from the stock unit, an orange band giving the purchase coefficient is displayed.

1 Btes (Achats) = 5 Unité (Entrée)

23.7.2.2. Dispute block

- **Qty in dispute**
- **Dispute**
- **Dispute comment**

23.7.2.3. Description block

- **Detailed description**



The sum of the quantities to be entered from the Location block and the disputed quantity from the Dispute block must be equal to the quantity received.

23.8. Step 3 – Delivery note

23.8.1. Presentation

This step allows the user to fill in information about the delivery note.

23.8.2. Data displayed



This step presents the delivery note information.

- **Delivery note number**
- **Agent code**
- **Delivery date**

23.8.2.1. Comments» block

- **Comment**

23.8.2.2. Receipts block

- **Received item name and code**
- **Supplier name and code**
- **Order, PR, or WR name and code**
- **Quantity received and quantity remaining to be delivered**
- The **Add a receipt** button returns to the screen of step 1 to select new items to be received

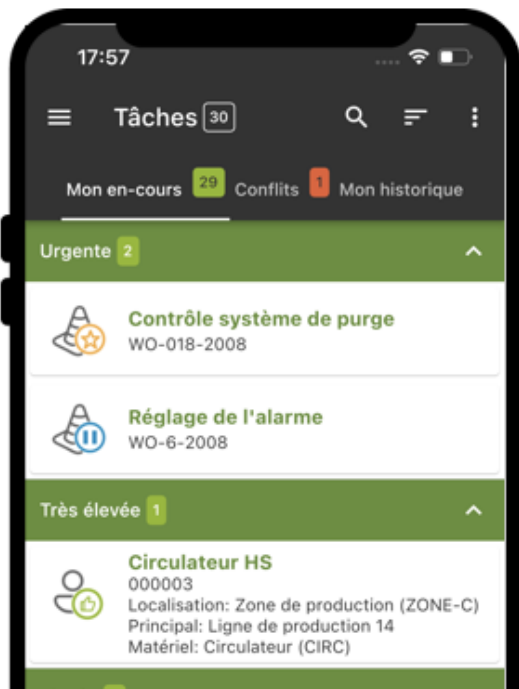
24. MANAGING CONFLICTS

The detection of a conflict in a task is handled in various ways in CARL Touch:

- **Changed icon** for the element with a conflict:

Icon	Meaning
	Task «With conflict».
	Task with WR origin «With conflict».
	Asset «With conflict».
	Location «With conflict».
	Item «With conflict».
	Withdrawal movement «With conflict».
	Entry movement «With conflict».
	Change of location movement «With conflict».
	Spontaneous inventory movement «With conflict».
	Prepared inventory «With conflict».
	Delivery note «With conflict».

- **«CONFLICTS» tab** on the current function: this tab groups all elements on which a conflict has been detected.



- On the detail form, **the field with errors is highlighted and an explanatory message displayed** to enable the user to identify the origin of the conflict:
 - The field with errors is displayed on a red background.
 - An explanatory message **displayed in red** sets out the origin of the conflict.



25. SETTINGS

The «Settings» menu, accessible via the general menu, enables the user to view and change the CARL Touch application settings via various forms.

25.1. Connection

The «Connection settings» form, accessible via the «Connection» option, enables the user to:

- view or set various settings for connecting to the CARL Source server,
- Manually reinitialise the data.

«Connection settings» section

- **Log-on username:** view and enter the username used to log on to the CARL Source server.
- **Access token:** used to find out whether an authentication token has been assigned to the CARL Touch user.
- **CARL Source server ***: public URL of the CARL Source server.
- **CARL Source User ***: Carl Source user identifier.
- **Last synchronization ***: Shows the date and time of the last synchronization with the CARL Source server – e.g. « *Last update: 01/09/2013 09:15:00* ».
If the terminal is on line, this field shows the value: "Connected."
- **Synchronization of documents ***: Shows whether documents will be synchronized «regardless of the network connection type» (Yes/No).

* *Read-only fields: values are set via CARL Source.*

«Reinitialization» section

- **Reinitialise data:** used to manually reinitialize the application data.

25.2. RFID device pairing

The list of RFID readers detected via Bluetooth is displayed.

The user can select the reader they want to pair with the mobile device.

25.3. Bluetooth pairing

The list of devices detected via Bluetooth is displayed.

The user can select the reader they want to pair with the mobile device.

25.4. Outstanding actions

The «Actions pending» form shows all **actions waiting to be transferred** from the CARL Touch mobile device to the CARL Source server.

The actions relate to all elements that may be created, changed or deleted via CARL Touch.

The «Pending actions» screen is organized as follows:

- The header shows the **number of actions pending** transmission.
- Pending actions are grouped by function, in specific blocks:
 - Pending actions relating to **Tasks**,
- Each message is displayed in a block showing:
 - The **identifier** of the element affected (e.g. task code).
 - The **type of action** taken on the element (e.g. task started).
 - The **date and time** at which the message was generated.

25.5. Date format

This option allows users to choose **the date format** used in CARL Touch.

This form shows the user the formats available: when the user selects a format, it will be used for all dates in the CARL Touch application.

Users can also change their **time zone**.

The application provides the various time zones defined in CARL Source.

25.6. «About»

The «About CARL Touch» form shows the following information:

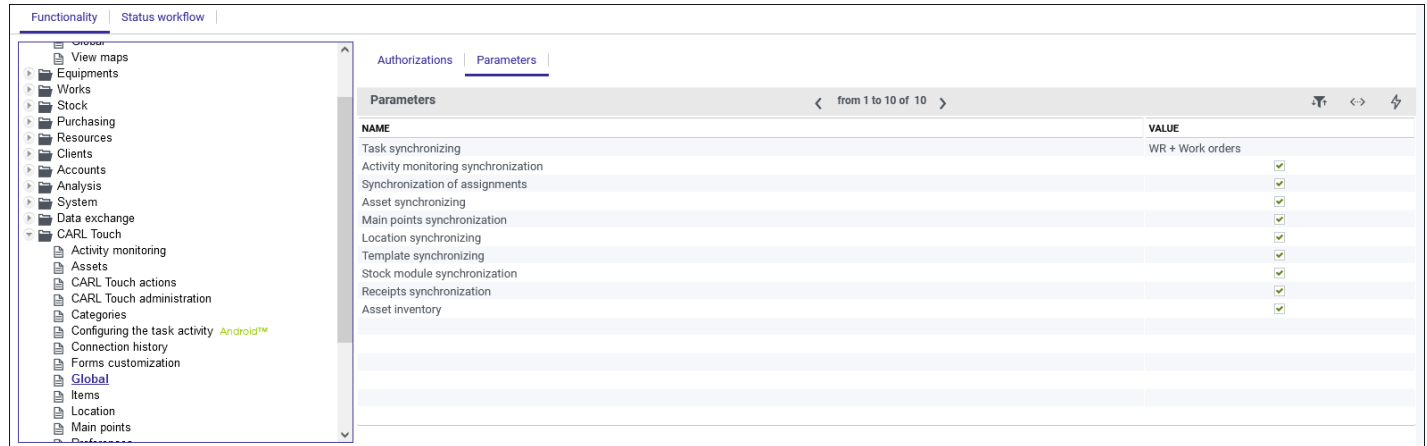
- **Version installed:** Version of the CARL Touch application currently installed on the mobile device.
- **Installation identifier**
- **General conditions for use:** Allows you to read the general conditions of use, and accept or refuse them.
- **Support website:** selecting this button opens a browser window with the «Support» website; the URL for this site can be defined by the administrator via the CARL Source vocabulary.

26. PROFILE RIGHTS FOR CARL TOUCH

The behaviour of CARL Touch depends partly on the user profile settings set in CARL Source.

26.1. Synchronization options

CARL Touch enables the synchronization of certain functions to be disabled. This is done in CARL Source in the user profile under the CARL Touch option, General.



NAME	VALUE
Task synchronizing	WR + Work orders
Activity monitoring synchronization	☒
Synchronization of assignments	☒
Asset synchronizing	☒
Main points synchronization	☒
Location synchronizing	☒
Template synchronizing	☒
Stock module synchronization	☒
Receipts synchronization	☒
Asset inventory	☒



The modification of one of these synchronization settings results in a mandatory reinitialization message being sent to all CARL Touch users with the changed profile.

26.1.1. Synchronization of tasks

CARL Touch can synchronise work requests (WRs) and/or work orders (WOs) with CARL Source.

A synchronization option defines which objects are pushed to CARL Touch users associated with the profile.

There are four possible options:

- None: No work requests (WRs) or work orders (WOs) are sent to CARL Touch users associated with this profile.
- WRs: Only work requests waiting to be taken into account and validated work orders (WOs) originating from WRs are transmitted to CARL Touch.
- WOs: Only validated work orders are transmitted to CARL Touch.
- WRs + WOs: Work requests and work orders are transmitted to CARL Touch.

26.1.2. Synchronization of activity tracking

CARL Touch makes it possible to synchronise labor types for various CARL Source work orders and labor types. If this option is enabled, activity tracking will be available in CARL Touch with or without a network connection.

26.1.3. Assignment synchronizing

CARL Touch enables the synchronization of work order assignments. If this option is enabled, the scheduling will be available in CARL Touch with or without a network connection.

26.1.4. Synchronization of assets

CARL Touch enables the synchronization of CARL Source assets. If this option is enabled, the assets and their characteristics will be available in CARL Touch with or without a network connection.

26.1.5. Synchronization of main points

CARL Touch enables the synchronization of CARL Source main points. If this option is enabled, the main points and their characteristics will be available in CARL Touch with or without a network connection.

26.1.6. Synchronization of locations

CARL Touch enables the synchronization of CARL Source location points. If this option is enabled, the locations and their characteristics will be available in CARL Touch with or without a network connection.

26.1.7. Synchronization of models

CARL Touch enables the synchronization of CARL Source models. If this option is enabled, the models and their characteristics will be available in CARL Touch with or without a network connection.

26.1.8. Synchronization of stock module

CARL Touch enables the synchronization of CARL Source items. If this option is enabled, the items and their storage details will be available in CARL Touch with or without a network connection.

26.1.9. Synchronization of receipts

CARL Touch enables the synchronization of CARL Source receipts. If this option is enabled, the receipts will be available in CARL Touch with or without a network connection.

26.1.10. Asset survey

If this option is enabled, asset survey will be available in CARL Touch with or without a network connection.

26.2. Tasks

The CARL Touch «Tasks» function can be configured by means of the profile settings below:

Authorizations

Functionality | Status workflow

Clients

Accounts

Analysis

System

Data exchange

CARL Touch

- Activity monitoring
- Assets
- CARL Touch actions
- CARL Touch administration
- Categories
- Configuring the task activity
- Connection history
- Deliveries
- Forms customization
- Global
- Items
- Location
- Main points
- Preferences
- Prepared inventories
- Specific attributes configuration
- Stock movements
- Task transfer configuration
- Tasks

Authorizations | Parameters

Authorizations

< from 1 to 6 of 6 >

NAME	AUTHORIZATION
Authorization to geolocate a task's equipment	☒
Authorization to geolocate tasks	☒
Authorization to reject a task	☒
Authorization to transfer a task	☒
Authorization to assign a task from CARL Source	☒
Authorization to reschedule a task from CARL Source	☒
	</

Settings

Profiles > Profile detail

PROFILE DETAIL : CARL – CARL SOFTWARE

Profile: CARL, Domain: Full, Name: Carl Software, Organization: , Standard: ☐, Home screen: DASH_VIDE

Functionality | Status workflow

- Clients
- Accounts
- Analysis
- System
- Data exchange
- CARL Touch
 - Activity monitoring
 - Assets
 - CARL Touch actions
 - CARL Touch administration
 - Categories
 - Configuring the task activity
 - Connection history
 - Deliveries
 - Forms customization
 - Global
 - Items
 - Location
 - Main points
 - Preferences
 - Prepared inventories
 - Specific attributes configuration
 - Stock movements
 - Task transfer configuration
 - Tasks

Authorizations | Parameters

Parameters

NAME	VALUE
Custom sort attribute	
Ascending sort	☐
Secondary sort attribute	
Ascending sort	☐
Default task sorting	Priority
Default work type when creating a task	
Task display horizon (Days)	7
Forecasting lead time of scheduled tasks (Days)	7
Reason for pausing a task	☐
WO history	☐
Period (in months) for sending work order history	6
Max number of recorded work orders to be sent per equipment item	15
Report to be attached to the email when closing a task	WO_DETAIL
Labor reporting management mode	Semi-automatic
Enable multi-activity management	☐
Receive unassigned tasks	☒

26.2.1. Geolocation of equipment

All CARL Touch users can geolocate tasks in CARL Touch provided that their smartphone knows its GPS position.

A profile option enables equipment associated with each task to be geolocated. If the profile allows, the user can geolocate structure points and assets for a task. This data is transmitted to CARL Source and used to initialise or update the GPS coordinates of the equipment.

26.2.2. Geolocation of tasks

Provided that the smartphone knows its GPS position, this authorization gives access to the «Geolocate a task» action.

26.2.3. Authorization to reject a task

This authorization entitles a CARL Touch user to reject tasks on their list of current tasks.

If this authorization is not enabled, the *Reject* button will not be available in CARL Touch.

26.2.4. Authorization to transfer a task

This authorization allows CARL Touch users to transfer a task to another user. To do this, they access the Transfer button in the task details.

If this authorization is not enabled, the *Transfer* button will not be available in CARL Touch.

26.2.5. Customized sorting

The «Settings» sub-tab in the Tasks function is used to set task management settings in CARL Touch.

Profiles > Profile detail

PROFILE DETAIL : CARL – CARL SOFTWARE

Profile * CARL Domain * Full Name Carl Software Organization Standard Home screen * DASH_VIDE

Functionality | Status workflow

CLIENTS

- Accounts
- Analysis
- System
- Data exchange
- CARL Touch
 - Activity monitoring
 - Assets
 - CARL Touch actions
 - CARL Touch administration
 - Categories
 - Configuring the task activity
 - Connection history
 - Deliveries
 - Forms customization
 - Global
 - Items
 - Location
 - Main points
 - Preferences
 - Prepared inventories
 - Specific attributes configuration
 - Stock movements
 - Task transfer configuration
 - Tasks

Authorizations | Parameters

Parameters from 1 to 16 of 23

NAME	VALUE
Custom sort attribute	Location
Ascending sort	☒
Secondary sort attribute	Priority
Ascending sort	☐
Default task sorting	Priority
Default work type when creating a task	MAINT-CORR
Task display horizon (Days)	7
Forecasting lead time of scheduled tasks (Days)	7
Reason for pausing a task	☒
WO history	☒
Period (in months) for sending work order history	6
Max number of recorded work orders to be sent per equipment item	15
Report to be attached to the email when closing a task	WO_DETAIL
Labor reporting management mode	Semi-automatic
Enable multi-activity management	☒
Receive unassigned tasks	☒

The tasks list in CARL Touch is ordered using one of three standard sorting options: priority, proximity and occurrence date.

It is possible, however, to add another sorting option. To do so, simply select the attribute to be used as the additional sorting option for the tasks list. This attribute is selected using the list of values associated with the «Custom sorting attribute» setting.

Profiles > Profile detail

PROFILE DETAIL : CARL – CARL SOFTWARE

Profile * CARL Domain * Full Name Carl Software Organization Standard Home screen * DASH_VIDE

Functionality | Status workflow

Analysis

- System
- Data exchange
- CARL Touch
 - Activity monitoring
 - Assets
 - CARL Touch actions
 - CARL Touch administration
 - Categories
 - Configuring the task activity
 - Connection history
 - Deliveries
 - Forms customization
 - Global
 - Items
 - Location
 - Main points
 - Preferences
 - Prepared inventories
 - Specific attributes configuration
 - Stock movements
 - Task transfer configuration
 - Tasks
 - CARL Flash
 - CARL Xpress

Authorizations | Parameters

Parameters from 1 to 16 of 23

NAME	VALUE
Custom sort attribute	Location
Ascending sort	☒
Secondary sort attribute	Priority
Ascending sort	☐
Default task sorting	Priority
Default work type when creating a task	MAINT-CORR
Task display horizon (Days)	7
Forecasting lead time of scheduled tasks (Days)	7
Reason for pausing a task	☒
WO history	☒
Period (in months) for sending work order history	6
Max number of recorded work orders to be sent per equipment item	15
Report to be attached to the email when closing a task	WO_DETAIL
Labor reporting management mode	Semi-automatic
Enable multi-activity management	☒
Receive unassigned tasks	☒



Note on custom sort attributes:

A custom sort can be carried out on an xtra field. In this case, this field must be added to the list of values associated with the desired custom sort.

Value lists may be enriched in the Value List function of the CARL Source System module.

After selecting the custom sorting attribute, the order (ascending or descending) can be selected by checking or unchecking the «Ascending order» check box.

Ascending sort ☒

26.2.6. Secondary sort

In addition to the main sort (by priority, proximity, occurrence date or custom sort), a second sort key can be defined. This key is applied after the first sort criterion selected.

To select the attribute to be used as a second sort key, simply call up the list of values associated with the «Secondary sorting attribute» setting and define the sort order.

Secondary sort attribute Priority ☒

26.2.7. Default sort

The default sort used to order the tasks list in CARL Touch is defined in CARL Source for the user profile.

The list of values associated with this setting offers four possible choices. This selection is to be made among the 3 standard sorts: Priority, Date of appearance, Proximity, as well as any previously selected Custom sort.



The «Custom» default sort requires a custom sorting attribute to be selected beforehand. If no attribute has been selected and custom sort is selected as default, tasks will be sorted by priority.

26.2.8. Default type of work

The default type of work will be initialized whenever a task is created in CARL Touch. This attribute is mandatory when creating tasks of work order origin. Entering a default value is recommended.

26.2.9. Task display horizon (days)

This setting is used to restrict tasks displayed in CARL Touch to those whose start date is earlier than the specified horizon. This setting is a horizon expressed in days.

Only tasks with a start date earlier than the system date + horizon (days) will be displayed in the tasks list. This avoids overloading the list with tasks that are not due to start before n day(s).

As default, this setting is set to 7 (days).

26.2.10. Reason for pausing a task

If this setting is enabled, the CARL Touch user will have to select a reason whenever they pause a task. The reason for pausing is selected from the values on the TOUCHTASKREASON values list. The Value List function in the System module of CARL Source can be used to add values to the list.

26.2.11. Work order history

Three settings control the equipment work order history.

If the Work order history setting is enabled, the equipment work order history is available in off-line mode.

If not, the equipment work order history is not downloaded into CARL Touch and the user must have a network connection to the CARL Source server to view it in CARL Touch.

The other two settings are used to limit the number of work orders (Completed, Closed or Archived) stored in the history for each element.

This limit is expressed as a period (in months), i.e. the work order history is searched over the past n months.

There is also a limit to the maximum number of work orders retrieved for the period defined above.

WO history	☒	
Period (in months) for sending work order history		6
Max number of recorded work orders to be sent per equipment item		15

In the example above, only the 15 most recent work orders over the last 6 months will be available in the work order history.

26.2.12. Version of work order sent by e-mail

This setting is used to specify which version of the work order will be attached to the e-mail sent when the work order is closed.

Report to be attached to the email when closing a task	WO_DETAIL
--	-----------

The principle is as follows: If the CARL Touch task has been signed and one or more e-mail addresses have been entered, an e-mail will be sent to the addressees with this version (in PDF format) attached.

The message template used for this e-mail is defined in the work order status workflow, when the work order status is changed to

«Closed».

STATUS WORKFLOW

General

Main branch: WOSTATUSSTOUCH, Name: Work order status, Status: Active, Origin: Standard

Status list

SEQ	STATUS	NAME	INITIAL	MODIFY	DELETE	MESSAGE	PROCESSING CLASS	FAMILY	LEGACY
0	REQUEST	In preparation	☒	☒	☒		WOSimple	In preparation	☒
1	AWAITINGESTIMATE	Awaiting quote	☒	☒	☒		WOSimple	Awaiting validation	☐
2	AWAITINGVALID	Awaiting validation	☒	☒	☒		WOSimple	Awaiting validation	☐
3	VALIDATE	Validated	☒	☒	☐		WOValidate	Validated	☐
4	AWAITINGITEM	Awaiting supply	☐	☒	☐		WOSimple	Validated	☐
5	AWAITINGREAL	Work awaiting start	☐	☒	☐		WOSimple	Validated	☐

Transitions: En preparation

SEQ	FINAL STATUS	NAME	MESSAGE	AUTO	CONFIRMATION PAGE	PROCESSING CLASS	FAMILY	SIGNATURE	LEGACY
0	AWAITINGVALID	Request approval		☐	WO transitions	WOAwaitingValid	Request approval	☐	☐
1	AWAITINGESTIMATE	Request a quote		☐	WO transitions	Simple	Request approval	☐	☐
2	VALIDATE	Confirm		☐	WO transitions	WOValidate	Confirm	☐	☐
3	CANCEL	Cancel		☐	WO transitions	WOCancel	Cancel	☐	☐

The sending of the e-mail is triggered when the work order is closed.

Message template content: TMPL_EDITTASK, can be changed in the *Message templates* feature (CARL Source System module)

MESSAGE TEMPLATE

General

Message template: TMPL_EDITTASK, Name: Work order issue, Type: Transition, Status: Active, Issuer: noreply@domain.com, Format: HTML, Referenced entity: WO

Message

Object: Work order (code) - {description}

Body:

Please find enclosed the work order (code)

Best regards,
(createdBy.fullName)
tel: (createdBy.phoneNumbers.HOME_PHONE)
email: (createdBy.phoneNumbers.EMAIL)

Test entity: [Search], Indicator: [Search], User: [Search], Auto processing: [Test]

26.2.13. Labor management mode

This setting is used to select the labor type management mode in CARL Touch.

Labor reporting management mode

Enable multi-activity management

Receive unassigned tasks

Semi-automatic

Manual

Semi-automatic

Automatic

CARL Touch offers two labor type management modes.

- Automatic mode

Labor types are calculated automatically by Carl Touch by deducting the date/time that the task was paused or closed from the date/time of starting (or restarting) the task. The labor is automatically sent to CARL Source and is assigned to the CARL Touch technician's default time type.

- Semi-automatic mode

This mode enables labor types calculated by CARL Touch to be added, changed or deleted prior to being sent to CARL Source. When a task is paused or closed, CARL Touch displays a labor type pre-validation form. This form is used to declare several technicians on the same task.

- Manual mode

This mode enables CARL Touch users to enter labor types for a task themselves.

26.2.14. Enable multiple-activity management

At the same time as a task, you may be required to work on other activities (e.g. Tool preparation, Lockout from service, Travel, etc.). This

setting is used to manage the time spent on those various activities in CARL Touch. By identifying the start and end of the activity, you will generate a labor type with the labor type selected in [Configuring the activities of a task](#).

Enable multi-activity management ☒

26.2.15. Receive unassigned tasks

If this setting is enabled, CARL Touch users with this profile will receive unassigned tasks, i.e. tasks that are not assigned to anyone. If not, work orders and/or work requests with no addressee, manager, scheduled resource, etc., are not sent to CARL Touch.

26.2.16. Presence check

This setting is used to activate presence checks on tasks. These checks may be optional, mandatory, or disabled.

Presence check management mode	Yes (Optional) ▼
Status of WR being created	No
Linked tasks created status	Yes (Optional)
Documents synchronization for current tasks	Yes (Required)
Documents synchronization for stored tasks	

26.2.17. Status of WRs being created

This setting defines the status of work requests when they are created in CARL Touch. The possible values are «In preparation» and «Not yet taken into account».

26.2.18. Status of linked tasks being created

This setting defines the status of linked tasks when they are created in CARL Touch. The possible values are «In preparation», «Awaiting supplies», «Awaiting start of work» and «Validated».

Etat des tâches liées en création	Validé ▼
	Attente réalisation
	En préparation
	Validé
	Attente fourniture

26.2.19. Synchronization of documents

Three settings are used to manage the synchronization of documents related to tasks.

If the Synchronize documents for current tasks setting is enabled, the documents related to the current tasks will be synchronized in CARL Touch.

If the Synchronize documents for logged tasks setting is enabled, the documents related to logged tasks will be synchronized in CARL Touch.

The Maximum Size of sent documents setting allows you to define the maximum size of documents that will be synchronized in CARL Touch.

If this setting is not defined, the size of synchronized documents will no be controlled.

Synchronisation des documents pour les tâches en cours	☒
Synchronisation des documents pour les tâches historisées	☐
Taille maximale des documents envoyés	

26.2.20. Impose a strict fault tree structure

If this setting is enabled, the values proposed in the list of symptoms, causes and remedial actions will be limited to the values of the fault tree of the model or task asset.

Imposer un arbre de défaillance strict ☐

26.3. Main points

The CARL Touch «Main points» function can be configured by means of the profile settings below:

Authorizations

Profil > Détail d'un profil

DÉTAIL DU PROFIL CARL - CARL SOFTWARE DÉVELOPPEMENT

Un **profil** est un ensemble de données qui concernent l'utilisateur. L'onglet **[Fonctionnalités]** vous permet pour chaque fonctionnalité, de ... ?

Profil: CARL
Domaine: Complet

Libellé: Carl Software Développement
Organisation: Standard ☐ Ecran d'accueil: DASH_CARL

Fonctionnalités Workflow d'états

- Comptes
- Analyse
- Système
- Echange de données
- CARL Touch
 - Actions CARL Touch
 - Administration CARL Touch
 - Articles *Android™*
 - Catégories
 - Configuration des activités d'une tâche *Android™*
 - Configuration des attributs spécifiques *Android™*
 - Configuration du transfert de tâche
 - Global
 - Historique de connexion
 - Inventaires préparés *Android™*
 - Localisations *Android™*
 - Matériels *Android™*
 - Mouvements de Stock *Android™*
 - Personnalisation des formulaires
 - Points principaux *Android™*
 - Préférences
 - Suivi d'activité *Android™*
 - Tâches
- CARL Flash
- CARL Xpress

Autorisations Paramètres

Autorisations de 1 à 2 sur 2

LIBELLÉ	AUTORISATION
Autorisation de géolocaliser les points principaux	☒
Appairage NFC autorisé	☒

Settings

Profil > Détail d'un profil

DÉTAIL DU PROFIL CARL - CARL SOFTWARE DÉVELOPPEMENT

Un **profil** est un ensemble de données qui concernent l'utilisateur. L'onglet **[Fonctionnalités]** vous permet pour chaque fonctionnalité, de ... ?

Profil: CARL
Domaine: Complet

Libellé: Carl Software Développement
Organisation: Standard ☐ Ecran d'accueil: DASH_VIDE

Fonctionnalités Workflow d'états

- Comptes
- Analyse
- Système
- Echange de données
- CARL Touch
 - Actions CARL Touch
 - Administration CARL Touch
 - Articles *Android™*
 - Catégories
 - Configuration des activités d'une tâche *Android™*
 - Configuration des attributs spécifiques *Android™*
 - Configuration du transfert de tâche
 - Global
 - Historique de connexion
 - Inventaires préparés *Android™*
 - Localisations *Android™*
 - Matériels *Android™*
 - Mouvements de Stock *Android™*
 - Personnalisation des formulaires
 - Points principaux *Android™*
 - Préférences
 - Suivi d'activité *Android™*
 - Tâches
- CARL Flash
- CARL Xpress

Autorisations Paramètres

Paramètres de 1 à 8 sur 8

LIBELLÉ	VALEUR
Attribut de tri personnalisé	
Tri croissant	☐
Attribut de tri secondaire	
Tri croissant	☐
Tri par défaut des points principaux	Type
Etat des points principaux en création	Validé
Synchronisation des documents	
Taille maximale des documents envoyés	

26.3.1. Geolocation of main points

Provided that the smartphone knows its GPS position, this authorization gives access to the «Geolocate a main point» action.

26.3.2. NFC pairing

If the smartphone has NFC circuitry, this authorization allows a main point to be paired with an NFC label.

26.3.3. Status of main points being created

This setting defines the status of main points when they are created in CARL Touch.

The possible values are «In preparation» and «Validated».

Etat des points principaux en création

Validé

En préparation

Validé

26.3.4. Custom sort

The list of main points in CARL Touch is ordered using one of four standard sorting options: Proximity, Equipment type, Organization and Location.

It is possible to add a custom sort. To do this, the attribute of a main point that is to be used for the custom sort needs to be selected.

Paramètres	de 1 à 8 sur 8	⚙️	↔️	⚡
LIBELLÉ	VALEUR			
Attribut de tri personnalisé	Organisation			
Tri croissant				
Attribut de tri secondaire	Code			
Tri croissant	Description			
Tri par défaut des points principaux	Type			
Etat des points principaux en création	Localisation			
Synchronisation des documents	Parent principal			
Taille maximale des documents envoyés	Modèle			
	Organisation			
	Client			
	Adresse 1			
	Adresse 2			
	Adresse 3			
	Centre de coût			
	Responsable			
	Fiche sécurité			
	Interventions autorisées			

The order of the custom sort (ascending or descending) can be selected.

Paramètres	de 1 à 8 sur 8	⚙️	↔️	⚡
LIBELLÉ	VALEUR			
Attribut de tri personnalisé	Modèle			
Tri croissant	☒			

26.3.5. Secondary sort

In addition to the main sort (by Proximity, Equipment type, Organization or customized sort), a second sort key can be defined. This key is applied after the first sort criterion selected.

To select the attribute to be used as a second sort key, simply call up the list of values associated with the «Secondary sorting attribute» setting and define the sort order.

Attribut de tri secondaire	Responsable
Tri croissant	☐

26.3.6. Default sort

The default sort used to order the list of main points in CARL Touch is defined in CARL Source for the user profile.

The list of values associated with this setting offers four possible choices. This selection is to be made among the 4 standard sorts: Type, Proximity, Organization as well as any previously selected custom sort.

Tri par défaut des points principaux	Type
Etat des points principaux en création	Type
Synchronisation des documents	Proximité
Taille maximale des documents envoyés	Organisation
	Localisation
	Personnalisé



The «Custom» default sort requires a custom sorting attribute to be selected beforehand. If no attribute has been selected and custom sort is selected as default, main points will be sorted by Equipment type.

26.3.7. Synchronization of documents

If the Synchronize documents setting is enabled, the documents related to the main points will be synchronized in CARL Touch.

The Maximum Size of sent documents setting allows you to define the maximum size of documents that will be synchronized in CARL Touch.

If this setting is not defined, the size of synchronized documents will no be controlled.

Document synchronizing	☒
Maximum size of documents sent	

26.4. Locations

The CARL Touch «Locations» function can be configured by means of the profile settings below:

Authorizations

Profile: CARL, Domain: Full, Name: Carl Software, Organization: [Search], Standard: ☐, Home screen: DASH_VIDE [Search]

Functionality | Status workflow |

Analysis
System
Data exchange
CARL Touch
Activity monitoring
Assets
CARL Touch actions
CARL Touch administration
Categories
Configuring the task activity
Connection history
Deliveries
Forms customization
Global
Items
Location
Main points
Preferences
Prepared inventories
Specific attributes configuration
Stock movements
Task transfer configuration
Tasks
CARL Flash
CARL Xpress

Authorizations | Parameters |

Authorizations

NAME	AUTHORIZATION
Authorization to geolocate locations	☒
NFC registration authorized	☒

Settings

Profile: CARL, Domain: Full, Name: Carl Software, Organization: [Search], Standard: ☐, Home screen: DASH_VIDE [Search]

Functionality | Status workflow |

Analysis
System
Data exchange
CARL Touch
Activity monitoring
Assets
CARL Touch actions
CARL Touch administration
Categories
Configuring the task activity
Connection history
Deliveries
Forms customization
Global
Items
Location
Main points
Preferences
Prepared inventories
Specific attributes configuration
Stock movements
Task transfer configuration
Tasks
CARL Flash
CARL Xpress

Authorizations | Parameters |

Parameters

NAME	VALUE
Custom sort attribute	Organization
Ascending sort	☒
Secondary sort attribute	Type
Ascending sort	☒
Locations default sorting	Organization
Status of locations being created	Validated
Document synchronizing	☐
Maximum size of documents sent	

26.4.1. Geolocation of locations

Provided that the smartphone knows its GPS position, this authorization gives access to the «Geolocate a location» action.

26.4.2. NFC pairing

If the smartphone has NFC circuitry, this authorization allows a location to be paired with an NFC label.

26.4.3. Report of locations being created

This setting defines the status of location points when they are created in CARL Touch.

The possible values are «In preparation» and «Validated».

Status of locations being created

Document synchronizing

Maximum size of documents sent

Validated
In preparation
Validated

26.4.4. Custom sort

The list of locations in CARL Touch is ordered using one of three standard sorting options: Proximity, Equipment type and Organization.

It is possible to add a custom sort. To do this, the attribute of a location to be used for the custom sort needs to be selected.

The screenshot shows the 'PROFILE DETAIL : CARL - CARL SOFTWARE' interface. The 'Parameters' tab is active, displaying a list of parameters. The 'Custom sort attribute' is set to 'Model'. The 'Value' column shows a dropdown menu with 'Model' selected.

NAME	VALUE
Custom sort attribute	Model
Ascending sort	Location
Secondary sort attribute	Model
Ascending sort	Organization
Locations default sorting	Client
Status of locations being created	Inventory number
Document synchronizing	Use
Maximum size of documents sent	Address 1
	Address 2
	Address 3
	Cost center
	Manager
	LFA
	THFA
	TGFA
	Capacity
	Covered parking space
	Outdoor parking space
	Safety sheet
	Work orders authorized

The order of the custom sort (ascending or descending) can be selected.

The 'Paramètres' dialog box shows the 'Attribut de tri personnalisé' (Custom sorting attribute) set to 'Modèle' (Model) and the 'Tri croissant' (Ascending sort) option selected.

26.4.5. Secondary sort

In addition to the main sort (by Proximity, Equipment type, Organization or customized sort), a second sort key can be defined. This key is applied after the first sort criterion selected.

To select the attribute to be used as a second sort key, simply call up the list of values associated with the «Secondary sorting attribute» setting and define the sort order.

The 'Secondary sort attribute' setting shows 'Manager' selected.

26.4.6. Default sort

The default sort used to order the list of locations in CARL Touch is defined in CARL Source for the user profile.

The list of values associated with this setting offers four possible choices. This selection is to be made among the 3 standard sorts: Type, Proximity, Organization as well as any previously selected Custom sort.

The 'Locations default sorting' setting shows 'Organization' selected.



The «Custom» default sort requires a custom sorting attribute to be selected beforehand. If no attribute has been selected and customized sort is selected as default, locations will be sorted by Organization.

26.4.7. Synchronization of documents

If the Synchronize documents setting is enabled, the documents related to locations will be synchronized in CARL Touch.

The Maximum Size of sent documents setting allows you to define the maximum size of documents that will be synchronized in CARL Touch.

If this setting is not defined, the size of synchronized documents will no be controlled.

The 'Document synchronizing' setting shows the 'Maximum size of documents sent' field.

26.5. Assets

The CARL Touch «Assets» function can be configured by means of the following authorizations and profile settings.

Authorizations

The screenshot shows the 'PROFILE DETAIL : CARL - CARL SOFTWARE' page. The 'Authorizations' tab is selected, displaying a table of permissions. The left sidebar shows a tree view with 'Assets' selected under 'CARL Touch'. The top navigation bar includes icons for home, settings, and a search icon. The main content area has a header with 'Profile * CARL' and 'Name Carl Software'. Below this is a search bar and a 'Standard' checkbox. The table lists three authorizations: 'Authorization to geolocate assets', 'NFC registration authorized', and 'RFID pairing allowed', each with a corresponding checkbox.

NAME	AUTHORIZATION
Authorization to geolocate assets	☒
NFC registration authorized	☒
RFID pairing allowed	☐

Settings

The screenshot shows the 'PROFILE DETAIL : CARL - CARL SOFTWARE' page. The 'Parameters' tab is selected, displaying a table of settings. The left sidebar shows a tree view with 'Assets' selected under 'CARL Touch'. The top navigation bar includes icons for home, settings, and a search icon. The main content area has a header with 'Profile * CARL' and 'Name Carl Software'. Below this is a search bar and a 'Standard' checkbox. The table lists eight parameters: 'Custom sort attribute', 'Ascending sort', 'Secondary sort attribute', 'Ascending sort', 'Assets default sorting', 'Status of assets being created', 'Document synchronizing', and 'Maximum size of documents sent', each with a corresponding value and a checkbox.

NAME	VALUE
Custom sort attribute	Organization
Ascending sort	Criticality
Secondary sort attribute	Location
Ascending sort	Validated
Assets default sorting	Validated
Status of assets being created	Validated
Document synchronizing	Validated
Maximum size of documents sent	Validated

26.5.1. Asset geolocation

Provided that the smartphone knows its GPS position, this authorization gives access to the «Geolocate an asset» action.

26.5.2. NFC pairing

If the smartphone has an NFC chip, this authorization allows an asset to be paired with an NFC label.

26.5.3. RFID pairing

If the smartphone is paired with an RFID reader, this authorization allows an asset to be paired with an RFID tag.

26.5.4. Status of assets being created

This setting defines the status of assets when they are created in CARL Touch.

The possible values are «In preparation» and «Validated».

The screenshot shows a dropdown menu for the 'Status of assets being created' setting. The menu is open, showing three options: 'Validated', 'Validated', and 'In preparation'. A mouse cursor is pointing at the 'Validated' option.

26.5.5. Custom sort

The list of assets in CARL Touch is ordered using one of four standard sorting options: Proximity, Location, Equipment type and Model. It is possible to add a custom sort. To do this, the attribute of the asset to be used for this custom sort needs to be selected.

PROFILE DETAIL : CARL - CARL SOFTWARE

Profile: CARL, Domain: Full, Name: Carl Software, Organization: [search], Standard: ☐, Home screen: DASH_VIDE [search]

Functionality | Status workflow

Analysis | System | Data exchange | CARL Touch | Activity monitoring | Assets | CARL Touch actions | CARL Touch administration | Categories | Configuring the task activity | Connection history | Deliveries | Forms customization | Global | Items | Location | Main points | Preferences | Prepared inventories | Specific attributes configuration | Stock movements | Task transfer configuration | Tasks | CARL Flash | CARL Xpress

Authorizations | Parameters

Parameters: from 1 to 8 of 8

NAME	VALUE
Custom sort attribute	Organization
Ascending sort	Warranty
Secondary sort attribute	Last inventory date
Ascending sort	Service life
Assets default sorting	Manufacturer
Status of assets being created	PO reference
Document synchronizing	PR/PO
Maximum size of documents sent	Purchase date
	Purchase price
	PO commissioning date
	Reparable?
	Replacement date
	Replacement price
	Residual value
	Date residual value last calculated?
	Safety sheet
	Manager
	Supplier
	After-sales service
	Organization

The order of the custom sort (ascending or descending) can be selected.

Custom sort attribute	Organization
Ascending sort	☒

26.5.6. Secondary sort

In addition to the main sort (by proximity, location, equipment type, model or custom sort), a second sort key can be defined. This key is applied after the first sort criterion selected.

To select the attribute to be used as a second sort key, simply call up the list of values associated with the «Secondary sorting attribute» setting and define the sort order.

Secondary sort attribute	Criticality
Ascending sort	☒

26.5.7. Default sort

The default sort used to order the list of assets in CARL Touch is defined in CARL Source for the user profile.

The list of values associated with this setting offers four possible choices. This selection is to be made among the 4 standard sorts: Location, Proximity, Equipment type, Model, and any previously selected Custom sort.

Assets default sorting	Location
Status of assets being created	Location
Document synchronizing	Proximity
Maximum size of documents sent	Type
	Model
	Customized



The «Custom» default sort requires a custom sorting attribute to be selected beforehand. If no attribute has been selected and custom sort is selected as default, assets will be sorted by location.

26.5.8. Synchronization of documents

If the Synchronize documents setting is enabled, the documents related to assets will be synchronized in CARL Touch.

The Maximum Size of sent documents setting allows you to define the maximum size of documents that will be synchronized in CARL Touch.

If this setting is not defined, the size of synchronized documents will no be controlled.

Document synchronizing	☒
Maximum size of documents sent	

26.6. Prepared inventories

The CARL Touch «Prepared inventories» function can be configured by means of the following profile settings:

Authorizations

The screenshot shows the 'PROFILE DETAIL : CARL - CARL SOFTWARE' page. The 'Authorizations' tab is selected, displaying a table of authorization settings. The table has two columns: 'NAME' and 'AUTHORIZATION'. The 'NAME' column lists 'Authorization to refuse a prepared inventory' and 'Authorization to transfer a prepared inventory'. The 'AUTHORIZATION' column shows checkboxes, both of which are checked.

NAME	AUTHORIZATION
Authorization to refuse a prepared inventory	☒
Authorization to transfer a prepared inventory	☒

Settings

The screenshot shows the 'PROFILE DETAIL : CARL - CARL SOFTWARE' page. The 'Parameters' tab is selected, displaying a table of parameter settings. The table has two columns: 'NAME' and 'VALUE'. The 'NAME' column lists various parameters such as 'Custom sort attribute', 'Ascending sort', 'Secondary sort attribute', 'Ascending sort', 'Default sort order for prepared inventories', 'Reason for pausing a prepared inventory', 'Receive unassigned prepared inventories', 'Expected quantity visible', 'Document synchronizing', and 'Maximum size of documents sent'. The 'VALUE' column shows the corresponding values, including 'Warehouse', 'Manager', 'Planned execution date', and several checkboxes that are checked.

NAME	VALUE
Custom sort attribute	Warehouse
Ascending sort	☒
Secondary sort attribute	Manager
Ascending sort	☒
Default sort order for prepared inventories	Planned execution date
Reason for pausing a prepared inventory	☒
Receive unassigned prepared inventories	☒
Expected quantity visible	☒
Document synchronizing	☒
Maximum size of documents sent	

26.6.1. Authorization to refuse a prepared inventory

This authorization entitles a CARL Touch user to reject prepared inventories on their list of in-progress items.

If this authorization is not enabled, the *Reject* button will not be available in CARL Touch.

Authorization to refuse a prepared inventory ☒

26.6.2. Authorization to transfer a prepared inventory

This authorization allows a CARL Touch user to transfer a prepared inventory to another user. To do this, the user accesses the Transfer button in the prepared inventory details.

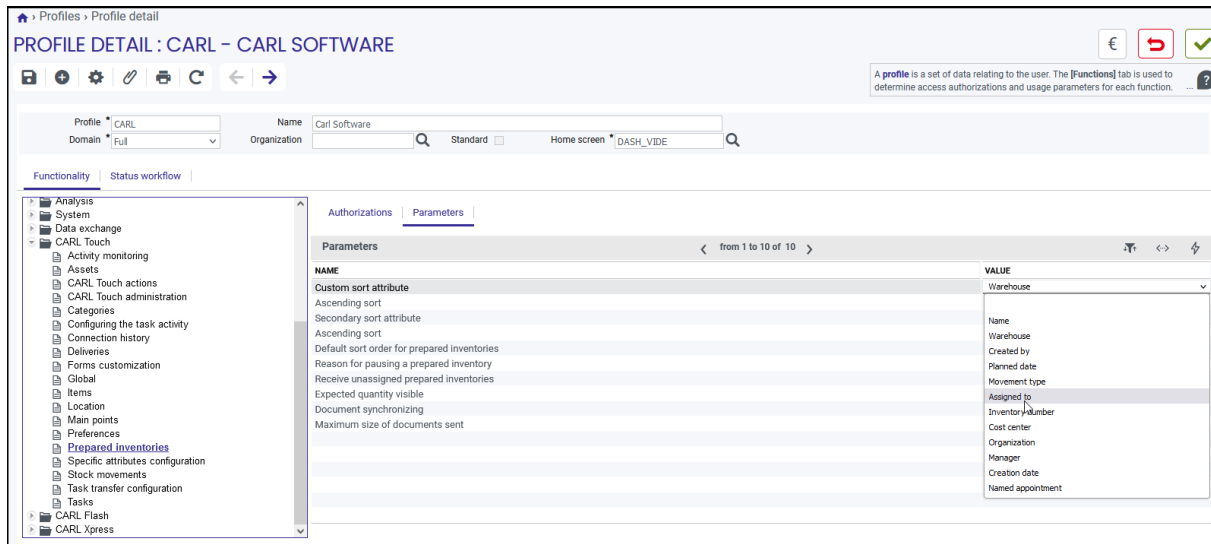
If this authorization is not enabled, the *Transfer* button will not be available in CARL Touch.

Authorization to transfer a prepared inventory ☒

26.6.3. Custom sort

The list of prepared inventories in CARL Touch is ordered using one of two standard sorting options: «Scheduled performance date» and «Warehouse».

It is possible to add a custom sort. To do this, the attribute of the prepared inventory to be used for the custom sort needs to be selected.



The order of the custom sort (ascending or descending) can be selected.

Custom sort attribute	Warehouse
Ascending sort	☒

26.6.4. Secondary sort

In addition to the main sort (by Performance date or Warehouse), a second sort key can be defined. This key is applied after the first sort criterion selected.

To select the attribute to be used as a second sort key, simply call up the list of values associated with the «Secondary sorting attribute» setting and define the sort order.

Secondary sort attribute	Manager
Ascending sort	☒

26.6.5. Default sort

The default sort used to order the list of prepared inventories in CARL Touch is defined in CARL Source for the user profile.

The list of values associated with this setting offers three possible choices. This selection is to be made among the 2 standard sorts: Performance date, Warehouse, and any previously selected Custom sort.

Default sort order for prepared inventories	Planned execution date
Reason for pausing a prepared inventory	Planned execution date
Receive unassigned prepared inventories	Warehouse
Expected quantity visible	Customized



The «Custom» default sort requires a custom sorting attribute to be selected beforehand. If no attribute has been selected and custom sort is selected as default, prepared inventories will be sorted by Performance date.

26.6.6. Reason for pausing a prepared inventory.

If this setting is enabled, the CARL Touch user will have to select a reason for pausing whenever a prepared inventory is paused. The reason for pausing is selected from the values on the TOUCHTASKREASON value list. The Value List function in the System module of CARL Source can be used to add values to the list.

Reason for pausing a prepared inventory	☒
---	-------------------------------------

26.6.7. Receiving unassigned prepared inventories.

If this setting is enabled, CARL Touch users with this profile will receive unassigned prepared inventories, i.e. not assigned to anyone. Otherwise, prepared inventories without an assigned responsible person will not be sent to CARL Touch.

Receive unassigned prepared inventories	☒
---	-------------------------------------

26.6.8. Expected quantity visible.

When enabled, this setting allows the quantity in stock of an item to be consulted before the prepared inventory is completed. By unchecking this setting, the user will not have any information on the expected quantity of the item.

Expected quantity visible



26.6.9. Synchronization of documents

If the Synchronize documents setting is enabled, the documents related to prepared inventories will be synchronized in CARL Touch. The Maximum Size of sent documents setting allows you to define the maximum size of documents that will be synchronized in CARL Touch.

If this setting is not defined, the size of synchronized documents will no be controlled.

Document synchronizing	
Maximum size of documents sent	

26.7. Stock movements

The CARL Touch «Stock movements» function can be configured by means of seven profile settings.

PROFILE DETAIL : CARL - CARL SOFTWARE

Profile: CARL, Name: Carl Software, Domain: Full, Organization: Carl Software, Standard: ☐, Home screen: DASH_VIDE

Parameters

NAME	VALUE
Permanent inventory authorized	☒
Custom sort attribute	Movement type
Ascending sort	☒
Secondary sort attribute	Item
Ascending sort	☒
Default sort order for stock movements	Movement date
Expected quantity visible on spontaneous inventory	☒

26.7.1. Permanent inventory

This setting, when enabled, allows an inventory movement to be performed at the same time as a withdrawal, entry or change of location movement.

Permanent inventory authorized	
--------------------------------	--

This permanent inventory is accessible from Step 3 of the wizard for entry, withdrawal and change of location movements, for non-serialized items.

26.7.2. Custom sort

The list of stock movements in CARL Touch is ordered using one of three standard sorting options: Date of movement, type of movement and item.

It is possible to add a custom sort. To do this, the attribute of the stock movement to be used for this custom sort needs to be selected.

Profiles > Profile detail

PROFILE DETAIL : CARL - CARL SOFTWARE

Profile: CARL, Name: Carl Software, Domain: Full, Organization: , Standard: ☐, Home screen: DASH_VIDE

Functionality: Analysis, System, Data exchange, CARL Touch, Activity monitoring, Assets, CARL Touch actions, CARL Touch administration, Categories, Configuring the task activity, Connection history, Deliveries, Forms customization, Global, Items, Location, Main points, Preferences, Prepared inventories, Specific attributes configuration, Stock movements, Task transfer configuration, Tasks, CARL Flash

Parameters

NAME	VALUE
Permanent inventory authorized	☒
Custom sort attribute	Movement type
Ascending sort	
Secondary sort attribute	
Ascending sort	
Default sort order for stock movements	
Expected quantity visible on spontaneous inventory	

The order of the custom sort (ascending or descending) can be selected.

Custom sort attribute	Movement type
Ascending sort	☒

26.7.3. Secondary sort

In addition to the main sort (by Date of movement, Type of movement or Item), a second sort key can be defined. This key is applied after the first sort criterion selected.

To select the attribute to be used as a second sort key, simply call up the list of values associated with the «Secondary sorting attribute» setting and define the sort order.

Secondary sort attribute	Item
Ascending sort	☒

26.7.4. Default sort

The default sort used to order the list of stock movements in CARL Touch is defined in CARL Source for the user profile.

The list of values associated with this setting offers four possible choices. This selection is to be made among the 3 standard sorts: Movement date, Movement type or Item as well as any previously selected Custom sort.

Default sort order for stock movements	Movement date
Expected quantity visible on spontaneous inventory	



The «Custom» default sort requires a custom sorting attribute to be selected beforehand. If no attribute has been selected and customized sort is selected as default, stock movements will be sorted by Date of movement.

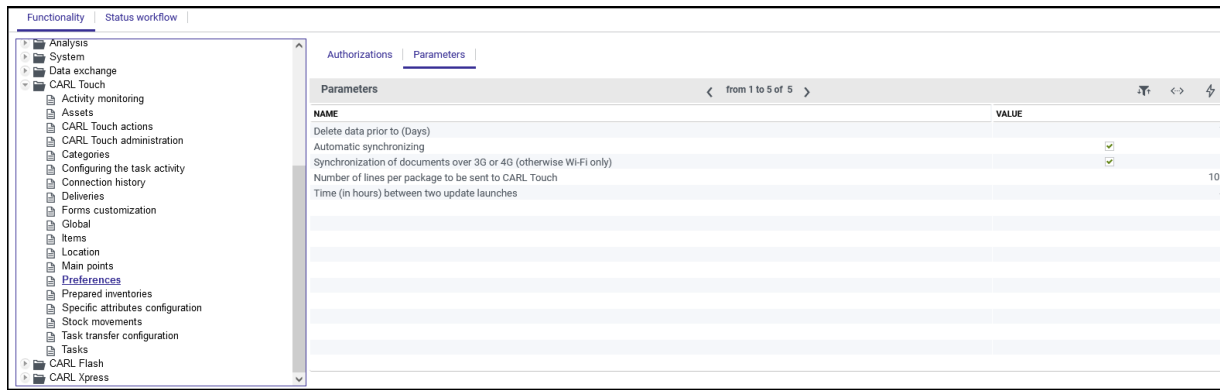
26.7.5. Expected quantity for spontaneous inventory

When enabled, this setting allows the quantity in stock of an item to be consulted before the spontaneous inventory is completed. By unchecking this setting, the user will not have any information on the expected quantity of the item.

Expected quantity visible on spontaneous inventory	☒
--	-------------------------------------

26.8. Preferences

Five CARL Touch user preferences can be controlled from the CARL Source profile. To set these settings, simply select the Preferences function (CARL Touch module).



26.8.1. Delete data older than (Days)

Used to delete tasks from the CARL Touch task history if they were completed or rejected more than n days ago.
As default, seven days of task history are kept.

26.8.2. Automatic synchronization

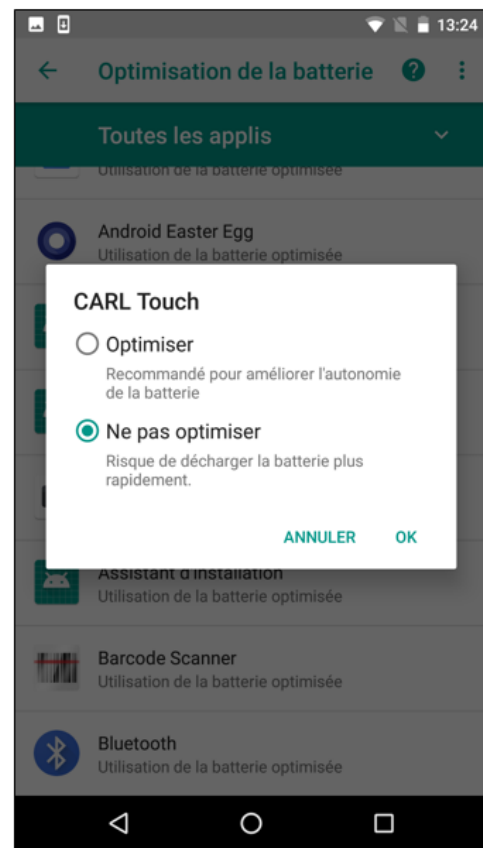
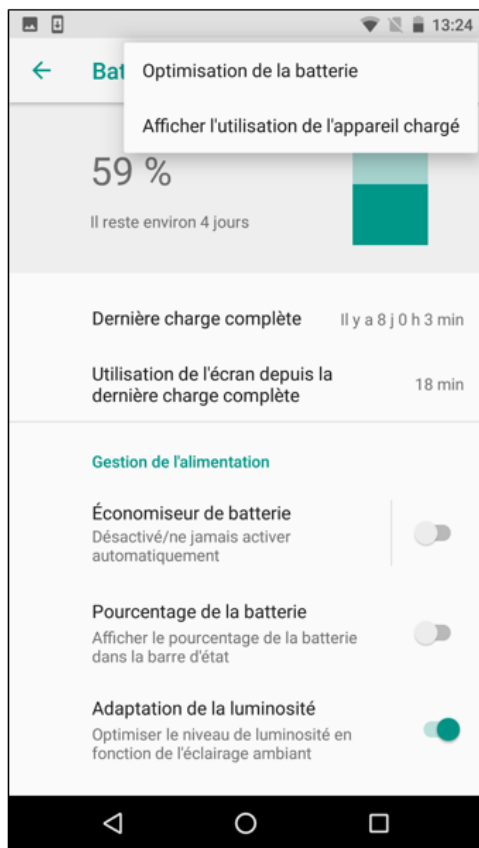
Enabling this setting turns on Push mode. If CARL Touch is running in this mode, a permanent connection is established with the CARL Source application server. CARL Touch receives and sends information to CARL Source in real time (subject to 3G/4G or WiFi network coverage).

This setting is enabled as default.

Starting with Android™ version 6.0, a Doze function saves battery power of the mobile device when in Doze mode. To continue to receive CARL Touch notifications when your device is in doze mode, the Doze function needs to be disabled for the CARL Touch application using the following procedure:

- Go to the settings of your smartphone or tablet.
- Select the "**Battery**" option.
- Click on the Menu button (3 vertical dots).
- Select the "**Battery optimization**" option.
- Click on the down arrow to the right of the words not optimized.
- Choose "**All applications**".
- Select the CARL Touch application from the list.
- Select the "**Do not optimise**" option.





26.8.3. Synchronization of documents over 3G/4G

This setting determines whether documents linked to CARL Touch tasks can be transferred over a 3G/4G network, or only over WiFi. Transferring documents over 3G/4G ensures that they are always available in CARL Touch with their associated task. If this setting is disabled, documents linked to CARL Touch tasks will not be available unless the smartphone is connected to a WiFi network.



Enabling this option will affect the volume of data downloaded and may result in higher charges depending on the users' mobile data plans.

26.8.4. Number of lines per packet

This setting sets the number of records in each packet sent by CARL Source to CARL Touch on request. This setting is used for CARL Touch searches requiring access to the application server. As default, this setting is set to 100.

26.8.5. Time (in hours) between two update reminders.

This setting, expressed in hours, determines how often CARL Touch issues reminder messages when a CARL Touch update has been detected and must be accepted by the user.

26.9. Log-on history

This profile node provides access to the action required to view CARL Touch users' log-on history. This action is available in the CARL Touch administration function.

This profile node provides access to the action required to manage CARL Touch database categories. This action is available in the CARL Touch administration function.

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27. CARL TOUCH SYSTEM SETTINGS

CARL Touch offers two settings making it possible to limit the size of photos and videos taken in CARL Touch. These settings are accessible from CARL Source, System Module, System Configuration function.

The screenshot shows the 'System Configuration' window with the 'Parameters' tab selected. The left sidebar lists various system modules, including CARL Source, CARL Flash, CARL Touch, and CARL Xpress. The main area displays a table of parameters:

PARAMETER	NAME	VALUE
☐ docMaxSize	Maximum size of documents sent to CARL Touch devices	5,120
☐ docSynchHorizon	Document synchronisation horizon in days	90
☐ logsRecipientEmailAddress	Email for CARL Touch log transmission	
☐ photoWidth	Size of photos taken in CARL Touch	Large
☐ videoMaxSize	Maximum size of videos taken in CARL Touch	10,240

Below the table, a 'Detail' section provides additional information for the 'photoWidth' parameter: 'Maximum size (in KB) of documents sent to CARL Touch devices (5 MB by default).'

27.1. Document transfer

This setting can be used to inhibit the transfer of linked documents whose size is greater than the value entered) (expressed in kB). As default, there are no restrictions.

Linked documents which exceed the limit can be viewed only in CARL Source, though the link remains visible in CARL Touch. A message informs the user when a document is not available in CARL Touch.



This limit does not apply for photos and videos taken by the CARL Touch user.

Photo and video limitations are managed by other system settings set out in the next two sections.

27.2. Photo resizing

CARL Touch makes it possible to limit the size of photos taken as documents linked to tasks, assets, locations and prepared inventories.

Four photo sizes are available:

The screenshot shows the 'photoWidth' parameter in the configuration table. The value 'Large' is selected, and a dropdown menu is open showing the available options:

- Small
- Average
- Large
- Actual size

- Small: photo resized to a width of 240 pixels (approximately 45 kB).
- Medium: photo resized to a width of 480 pixels (approximately 200 kB).
- Large: photo resized to a width of 1224 pixels (approximately 1600 kB).
- Actual size: No resizing - the photo will be sent at its original resolution.

This setting will be applied to all CARL Touch users connected to the same instance of CARL Source.

27.3. Video compression

CARL Touch makes it possible to limit the size of videos taken as documents linked to tasks, assets, locations and prepared inventories.

As default, this value is set at 10240 kB. In CARL Touch, when the video recording reaches this limit, it is automatically stopped, saved and sent to CARL Source.

28. ADMINISTRATION OF CARL TOUCH DEVICES

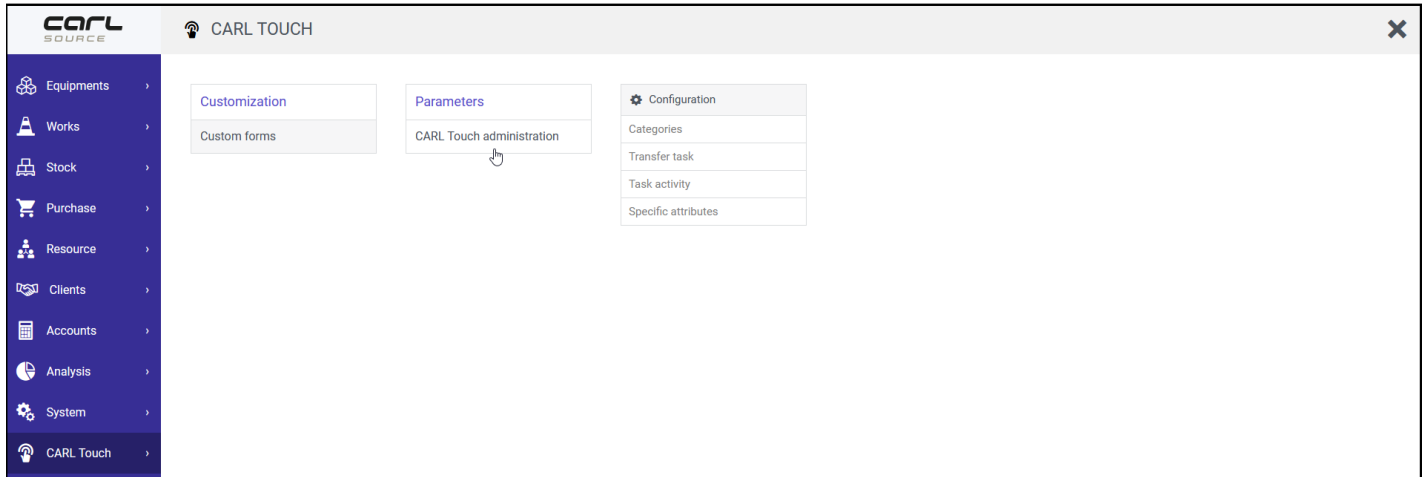
CARL Touch mobile terminals are administered via CARL Source.

For information on administering CARL Touch devices: refer to the "CARL Touch Administration" documentation.

28.1. Presentation

CARL Source offers a CARL Touch administration function. This function offers an at-a-glance view of the status of CARL Touch devices in use.

This CARL Touch administration function is available in the CARL Touch module of CARL Source.



28.2. Search form

28.2.1. Search tab

The «Search» tab is used to supervise CARL Touch devices and have an overview of all CARL Touch devices.

The following search criteria can be specified on this screen:

- **Identifier:** Device identification number.

- **Status:** Status of the device: Enabled, Disabled or Canceled.
- **Conflicts:** Search criterion for devices on which CARL Touch conflicts have been detected.
- **Current version:** Search criterion for selecting devices with an up-to-date CARL Touch version (or not up to date).
- **User:** CARL Touch user.
- **Network address:** Network address of device.
- **Session:** CARL Touch session identifier (DBId) for the device.
- **Installed on:** Search criterion for selecting devices based on their CARL Touch installation date.
- **Connected on:** Search criterion for selecting devices based on the date of the last CARL Touch user log-on.
- **Installed on:** Search criterion for selecting devices based on the date of the last CARL Touch user log-off.
- **Updated on:** Search criterion for selecting devices based on the date of the last CARL Touch update.
- **Brand name:** Manufacturer of the device.
- **Model:** Model of the device.
- **Operating system:** Version of the operating system installed on the peripheral.
- **Operator:** Operator (SIM) used by the device.
- **Connection:** Type of device connection (GPRS, EDGE, 3G, 4G, etc.).

28.2.2. Results tab

Criteria Favorites Result									
Result									
LOGIN	STATUS	USER	LAST NAME	VERSION	TIME ZONE	CONNECTED TO WEBSOCKET?	CONFLICTS	ACTIONS PENDING	
☐ 381ab7b6-e972-4c9e-88ae-568b2e1cad	Active	DOE	John DOE	v7.0.1-A0	Europe/Paris				

The «Results» tab displays a list of CARL Touch devices matching the search criteria entered.

The list of results shows exactly which CARL Touch version is installed on each device as well as any conflicts and pending messages.

The «Online» column shows in real time whether each device is connected to the server.

28.3. Detail form

The detail form shows the information specific to each CARL Touch device, along with the list of conflicts and pending messages.

28.3.1. General tab

General		Actions pending	Conflicts
Login		Awaiting reinitialization ☐	
Scope			
Status	Active	Version	v7.0.1-A0
Installed on	12/08/2022 16:55:06	Network address	86.202.220.211
Updated on	12/08/2022 16:55:06	Session	684414a6-9d56-4b1f-a29f-29a588707a3d
User	DOE	Time zone	Europe/Paris
Device			
Brand	iPhone	Operating system	16.0
Model	iPhone	SQLite version	3.38.5
Comments			

The comment field can be used to enter additional information about the device.

The status of a CARL Touch device may be Enabled, Disabled or Canceled.

The device can connect and receive messages only if its status is Enabled.

Setting a device's status to Disabled temporarily stops messages being transferred to the device. Actions destined for a disabled device are stored in CARL Source and are sent to the device when it returns to «Enabled» status.

Setting a device's status to «Canceled» permanently suspends the creation and transmission of messages to it. The device can no longer connect to the server and no more messages will be transferred to it. This status is irreversible and enables the device to be deleted via

the delete action .

28.3.2. Pending actions tab

This tab displays the list of actions pending for the current device. If there are pending actions, either the device is not connected or there are actions that have not yet been acknowledged by the device.

As default, the actions are sorted in chronological order.

The list displays:

- The action creation date.
- The type of action: (creation, modification, deletion).
- The object affected by the action.
- The entity or instance of the object affected by the action (e.g. a work order or WR code).
- The message itself, as it will be sent to the device.

Each message can be viewed in full by clicking on the message details access button .

The formatted message is then displayed.

NAME

Detailed name

```
[{
  "class": "action.UpdateAction",
  "collectionDescriptors": [],
  "creationTime": 1670482495821,
  "sequenceNumber": "33",
  "targetObject": {
    "WOFromEstimate": false,
    "actionType": {
      "code": "MAINT-CORR",
      "collectionDescriptors": [],
      "description": "Corrective Maintenance",
      "id": "5",
      "selectable": true
    },
    "address": { "collectionDescriptors": [] },
    "class": "Task",
    "code": "000003",
    "collectionDescriptors": [],
    "costCenter": {
      "code": "SUIVI-INFO",
      "collectionDescriptors": [],
      "description": "Centre de Coût pour le suivi des équipements - Informatique",
      "id": "4"
    },
    "createOnly": false,
    "createdBy": {
      "code": "DOE",
      "collectionDescriptors": [],
      "fullName": "John.DOE"
    }
  }
}]
```

CANCEL
CONFIRM

28.3.3. «Conflicts» tab

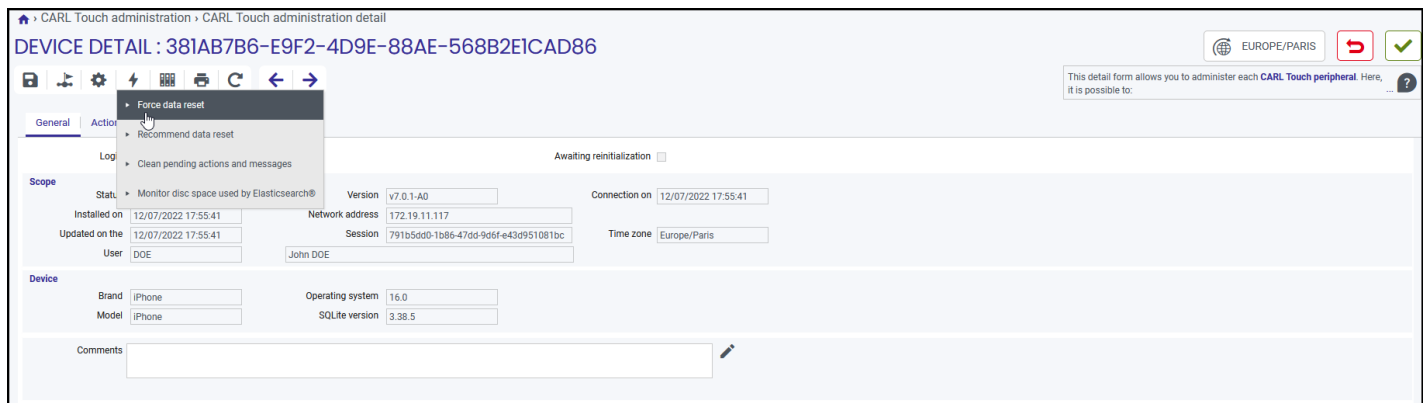
The «Conflicts» tab shows any outstanding conflicts on the device. This list of conflicts can be displayed in the CARL Touch device administration function, but also on the device itself.

A conflict is generated following an erroneous data entry in CARL Touch. Reference to a non-existent or unauthorized entity will generate a conflict.

28.4. Data reinitialization actions

CARL Source enables the remote reinitialization of CARL Touch data.

Two actions are available to this end, accessible either from the detail form for a device, or from the «Results» tab of the CARL Touch administration function.



28.4.1. Forcing a reinitialization of data

This action enables users to force the remote reinitialization of CARL Touch. For the current device, this action will trigger the following processes:

- Deletion of all pending actions
- Creation of a reinitialization order action



Reinitialization is mandatory for the CARL Touch user.

28.4.2. Advising a reinitialization of data

This action enables a message to be sent to CARL Touch suggesting that the CARL Touch user reinitialises his smartphone or tablet. This message does not entail a mandatory reinitialization and the CARL Touch user can therefore reject the operation.

29. FORM CUSTOMIZATION

The «Form customization» function, accessible via the CARL Touch module in CARL Source, can be used to **create customized versions** of the following forms:

- Detail form of a delivery,
- Detail form of an item,
- Detail form of a location,
- Detail form of a main point,
- Detail form of an asset,
- Search form of an asset,
- Detail form of a labor type.
- Detail form of a model,
- Detail form of a prepared inventory,
- Detail form of a task,
- Detail form of a WR task.



CARL Source provides «Standard» versions of these forms.

These «Standard» forms cannot be **changed** or **deleted**, but they may be **copied** to enable users to **customise** them to suit their needs.

Starting from a «Standard» form, various possibilities are available:

- display or hide certain data fields,
- change the order in which data appears on the form,
- for each data field, define whether or not it is «Mandatory» and whether or not it is «Changeable.»



When a form is changed in CARL Source, **the data on the mobile device must be reinitialized** to apply the change in CARL Touch.

29.1. Selecting a customization attribute

The CARL Touch application can display a detail form that is customized and tailored for a value found on a displayed entity. For example, a specific customized form can be displayed for certain types of equipment.

To achieve this, a discriminating attribute for the entity, which will be used to select the form to be displayed, must be selected. This setting is included in the dictionary and applicable for CARL Touch for the task, asset, location, item and prepared inventory entities.

Dictionary > Object detail

OBJECT DETAIL : MATERIAL - ASSET

An object referenced in the dictionary is an entity handled by CARL Source that can be adapted to your needs, by modifying its attributes as needed.

General | Attributes | Index

Object: MATERIAL Name: Asset

General

Category: Entity Module: Equipements Specific: ☐ Indexed: ☒

Pop-up information: Asset

Storage

Table: CSEQ_MATERIAL

Attributes

Authorized linked documents: ☒ Duplication possible: ☒

Process

Status workflow: MATERIALSTATUS Q Etat d'un équipement

Multi-workflow: ☒

Listening service (s):

Access restriction

Access restriction: ☒

Attribute:

Customization

Attribute: Equipment type

Audit

Audit enabled: ☐

Table:

Filter:

Identifiers: Identifier 1 Identifier 2 Identifier 3 Identifier 4

When the detail of an entity with a value set for the customization attribute is displayed in CARL Touch, the application determines whether there is a custom form with the same corresponding application value.

If a form corresponds, the form is then displayed. If not, the form defined as default is displayed.

The form customization values can be adjusted in the CARL Touch forms customization detail (see below).



For operation forms, as default the user can configure custom forms to be displayed only with particular operation codes.

29.2. Search form

29.2.1. Search tab

This tab is used to search through existing CARL Touch forms.

The following search criteria can be specified on this screen:

- **Code:** Form code.
- **Description:** Description of the form.
- **Form:** Type of form (e.g. «Task detail», «Asset detail»).
- **Function:** Function to which the form relates (e.g. «Locations», «Items», «Models»).
- **Standard:** «Standard form» indicator
- **As default:** «Default form» indicator.
- **Platform:** Platform's name.

29.2.2. Results tab

CUSTOM FORMS							
CUSTOM FORMS							
Criteria Favorites Result							
Custom form							
Module							
Created by							
Version							
Modified on the							
Min.							
Max.							
Name							
Functionality							
Confidentiality							
Origin							

The Results tab displays a list of CARL Touch forms matching the search criteria entered.

The results list shows, in particular, whether a form is considered as «Standard» or «Default».

29.3. Detail form

The detail form presents **general information** about a CARL Touch form, as well as **all attributes available** for the form.

The platform Exclusivity indication identifies fields that can only be used with Android™.

29.3.1. General tab

Custom forms > Detail of the custom form

CUSTOM FORM DETAIL : TASK-DET-DEFAULT – TASK DETAIL FORM

This detail form allows you to customize a **CARL Touch form** by copying a standard form. For each attribute of the form, it is possible to:

General

Code: TASK-DET-DEFAULT Name: Task detail form

Form

Functionality: Tasks Form: Task detail

Created by: By Default: ☒ Standard: ☒

Fields list

SEQ.	ATTRIBUTE	NAME	DISPLAYED	LIST	MANDATORY	EDITABLE	DUPLICATED	SCANNABLE	VALUES LIST	SUA	EXCLUSIVITY PLATFORM
0	description	Name	☒	☒	☐	☒	☐	☐			
10	BLOCK	General	☒	☐	☐	☒	☐	☐			
20	createdBy	Requested by	☒	☐	☐	☒	☐	☐			
30	workPriority	Priority	☒	☐	☐	☒	☐	☐	PRIORITYLEVEL		
35	workCategory	Category	☐	☐	☐	☐	☐	☐	WORKCATEGORY		
40	actionType	Activity type	☒	☐	☒	☒	☒	☒			
50	taskBegin	Start date and time	☒	☐	☐	☒	☒	☒			
60	taskEnd	End date and time	☒	☐	☒	☒	☒	☒			
70	expectedTime	Estimated time	☒	☐	☐	☒	☐	☐			
80	BLOCK	Equipments	☒	☐	☐	☐	☐	☐			
90	locationBox	Location	☒	☒	☐	☒	☐	☐			
100	mainBox	Main	☒	☒	☐	☒	☐	☐			
110	referMaterial	Referring asset	☐	☐	☐	☐	☐	☐			
120	material	Asset	☒	☐	☐	☒	☐	☐			
130	item	Model	☒	☒	☐	☒	☐	☐			
140	family	Family	☐	☐	☐	☐	☐	☐			

Detail form header

- **Code:** Form code.
- **Description:** Description of the form.

«Form» section

- **Function:** Function to which the form relates (e.g. «Locations», «Items», «Models»).
- **Form:** Type of form (e.g. «Task detail», «Asset detail»).
- **Created by:** The CARL Source agent who created the form.
- **As default:** Shows whether the form is considered as the «Default form» for the current function (Yes/No).
- **Standard:** Shows whether the form is a «Standard» (box checked) or customized (box not checked) form.



- A «Default» form may be defined for each function.
- At any given time, there can be only one «Default» form for each function.
- If no forms for a given function are defined as «Default», the «Standard» form is sent to CARL Touch.

«List of fields» tab

This sub-tab lists **all attributes available** for the form, and enables the user to **customise the final form**.

Possibilities include:

- specifying which attributes will be visible on the form on the mobile device,
- specifying which attributes are «Mandatory» and which are «Changeable»,
- associating values lists with attributes,
- And so on.

Each line in the table shows an attribute on the form with its associated properties.

The table is organized as follows:

- **Sequence:** Attribute sequence number. By changing this number the user can change the order in which fields appear on the form.
- **Attribute:** Attribute identifier (*read only*).
- **Description:** Attribute description (*read only*).
- **Displayed:** Determines whether the attribute is displayed in the form on the mobile device.
- **List ***: Determines whether the attribute is displayed on the list of the function associated with the form.
- **Required:** Determines whether entering this attribute is required.

- **Changeable:** Determines whether the value of this attribute can be changed.
- **Duplicated:** Determines whether the value of this attribute is to be duplicated from one creation to the next.
- **Scannable:** Used to add the possibility of scanning a QR Code on a field, via a QR Code icon displayed alongside the field in CARL Touch.
- **List of values:** Used to associate a list of values with the current attribute.
This information can be set only if the current attribute is linked to a values list. If this is not the case, this property is read only.
- **Summary:** This property can be set only if the current attribute is a «BLOCK» type. It specifies whether or not the current block is displayed as a summary block.
- **Platform:** Availability of the attribute for a single platform.
- : Information about the attribute in the dictionary.



* There cannot be more than 10 attributes listed.

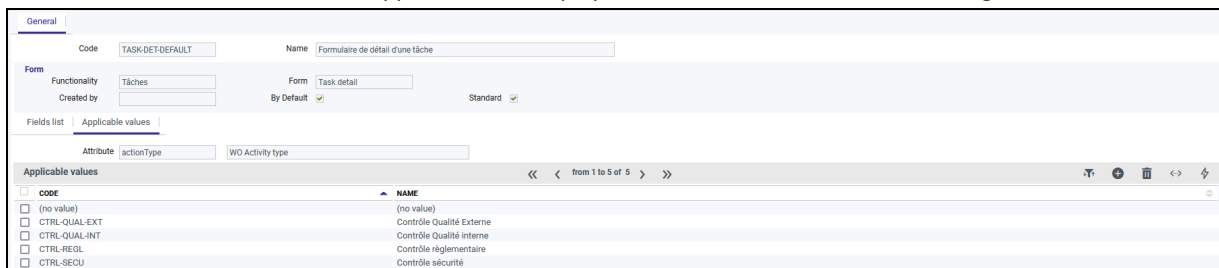


The data in the table is displayed in ascending order of the **sequence number** values.

Application values tab

This sub-tab includes a table showing values of the discriminating attribute for the main form entity, which determine how the form is displayed in CARL Touch.

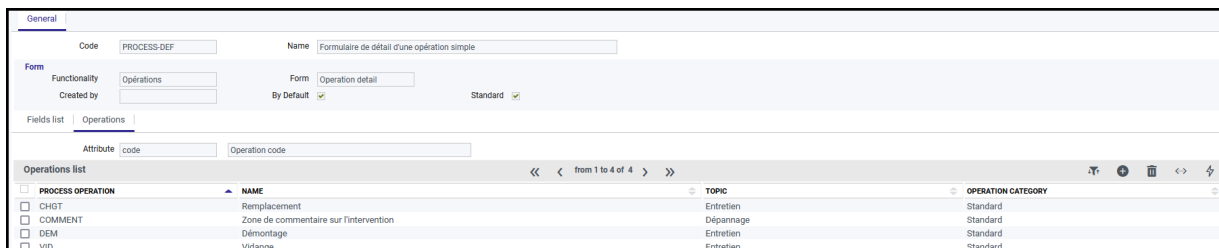
Users can delete an application value so as to no longer affect the form. They can also add values using the button to add lines to the table. In this case, the CARL Source application will display a table of values of the discriminating attribute that can be added to the form.



CODE	NAME
(no value)	(no value)
CTRL-QUAL-EXT	Contrôle Qualité Externe
CTRL-QUAL-INT	Contrôle Qualité Interne
CTRL-REQD	Contrôle réglementaire
CTRL-SECU	Contrôle sécurité



For detail operation forms, the operation code is the discriminating attribute and the application values may only be existing operation codes.



PROCESS OPERATION	NAME	TOPIC	OPERATION CATEGORY
CHGT	Remplacement	Entretien	Standard
COMMENT	Zone de commentaire sur l'intervention	Dépannage	Standard
DEM	Démontage	Entretien	Standard
VID	Vidange	Entretien	Standard

Form action: Configuring names

Each CARL Touch custom form can have dozens of attributes and up to 12 configurable blocks.

The **names** of these attributes and blocks are set on the **name configuration** screen, not in the «Form customization» function.

=> The « **Configure names** » action, accessible via the  icon, enables users to **navigate directly** to the name configuration function and customise the names of fields on the current CARL Touch form by language and/or business domain. The user is taken **straight to the correct set of names** and can customise them directly.

Sub-list action: Display/hide non-visible attributes

One of the available actions for the list of attributes (accessible via the  icon) is the « **Hide non-visible attributes** » action: this action re-loads the list of attributes to show only those whose « **Displayed** » property is set to « **Yes** ».

=> The re-loaded list gives the user a preview of the information that will **actually be visible** on the CARL Touch form **on the mobile device**.

To return to a display mode showing all the available attributes, the user can then choose the « **Display all attributes** » action.

29.4. Duplicating a form

Custom forms are created exclusively by **duplicating** another form.

The user can choose to duplicate a «**Standard**» form provided by CARL Source:

- Detail form of a delivery,
- Detail form of an item,
- Detail form of a location,
- Detail form of a main point,
- Detail form of an asset,
- Search form of an asset,
- Detail form of a labor type.
- Detail form of a model,
- Detail form of a prepared inventory,
- Detail form of a task,
- Detail form of a WR task.

... or any other **customized form** created previously.

The « *Duplicate* » action on an existing form may be initiated in two ways:

- Either **from the list of existing CARL Touch forms**, by selecting a form from the list and then clicking on the  button.
- Or **from the detail screen for the form to be duplicated**, by clicking on the  button.

After duplication, CARL Source displays a detail screen for the new form: this screen shows all attributes of the original form (sorted in the same way by order number) and prompts the user to enter a «Code» to identify the new custom form.

30. ATTRIBUTE CUSTOMIZATION

The CARL Touch application can display a customized attribute on a detail form. For example, it is possible to add a "contact" field (agent code) to the detail form of a task.

To do so, a few steps need to be followed:

1. Customizing forms.
2. Complete the dictionary.
3. Update the customization.
4. Configure the specific attributes.
5. Update the form customization.

30.1. Customizing forms

The new attributes are only visible in custom forms.

First, the form of the function in question needs to be customized - See [Form customization](#).

30.2. Completing the dictionary

In order to view a new attribute in a custom form, it must first be added to the associated object via the CARL Source dictionary.

The list of objects in question is as follows:

- **WO:** Work order
- **WOPROCESS:** Work order process.
- **WODIAGPROCESS:** Verification operation.
- **WOEQUIPMENTRELOCATIONPROCESS:** Operation of moving an asset upon work order completion.
- **WOCHOICEPROCESS:** Selection operation
- **TOUCHWOMEASUREPROCESS:** Reading operation of a CARL Touch work order.
- **WR:** Work request.
- **BOX:** Structure point.
- **MATERIAL:** Asset.
- **ITEM:** Item, model
- **PREPAREDINVENTORY:** Prepared inventory
- **DELIVERY:** PR/order receipt



This means that attributes added to objects other than those above will not be visible in the configuration function of the specific attributes - See [Configure the specific attributes](#).

To add a new attribute to an object:

1. Go to the "*Dictionary*" function of the "*System*" module.
2. Search for the object to be completed via the "*Criteria*" tab.
3. Open the detail form of the object to be completed.
4. On the "*Attributes*" tab, add a new line by clicking on the  button of the sub-table.

The fields to be filled in are as follows:

- Attribute
- Name
- Domain
- Associated entity *

- List of values *

* Editable field for certain "Domain" values.

Dictionary > Object detail

OBJECT DETAIL : WO - WO

General | **Attributes** | Index

Attributes (from 1 to 6 of 268)

ATTRIBUTE	NAME	SPECIFIC	DEFAULT VALUE	DOMAIN	MANDATORY
☒ contact	Contact	☒		Code	☐
☐ MRLinks	Links with maintenance requests	☐		Aucun	☐
☐ POLines	PO lines	☐		Aucun	☐
☐ POMode	POMode	☐		Booléen	☒
☐ PRLines	PR lines	☐		Aucun	☐
☐ PRLinesToDeliver	PRLinesToDeliver	☐		Aucun	☐

Attribute: contact

Domain: Code

Associated entity: ACTOR

Selection list: ACTORS

Compound entity:

Relation: n to 1

Value: Accuracy: -1, Decimals: -1, Minimum: , Maximum: , Chars no: 0

Search: Indexed: ☐, Text analyzer:

Entry: Values list: , Format: , Default value:

Property attributes: Currency: , Unit: , Decimal no:

Audit: Insertion: ☐, Modification: ☐, Delete: ☐

Export: Export plain text file: ☒, Export XML format: ☐

Persistence: To be copied: ☐, Persistent: ☒, Table: CSWO_WO, Column: CONTACT_ID

Controls: Bulk update: ☐, Single: ☐, Access restriction: ☐, Restriction Carrier: ☐, Mandatory: ☐

GDPR: GDPR: ☐

Input mask: Upper case: ☒, No space: ☒, Dyn. Expression: ☐, Hour: ☐, Percentage: ☐, Currency display: ☐, Unit display: ☐, Truncate: ☐, Multi-lines: ☐, Editor: ☐

30.3. Update the customization

Once the dictionary is configured, *CARL Source Admin* must be used to apply the customization.

To do so, the "Customization update" action must be started in the instance in question.

This action will change the database structure and inject the properties into the compiled classes to make them usable in the application.



The table migration script will require manual execution of SQL commands to update the tables.

30.4. Configure the specific attributes

Once the customization update has been applied, the new attributes will be available in the "Specific attributes" function of the "CARL Touch" module.

This function makes it possible to determine which customized attributes of the dictionary are to be taken into account in CARL Touch forms.

To choose an attribute:

1. Click on the button,
2. Select the object in question (the value list only offers dictionary objects containing specific attributes),
3. Select the attribute (the value list only offers the specific attributes of the selected object),
4. Confirm the form.

Specific attributes

SPECIFIC ATTRIBUTES

Result

OBJECT	OBJECT TYPE	ATTRIBUTE	ATTRIBUTE TYPE	SUBTYPE
☐ WO	com.carl.touch.dto.TaskDTO	contact - Contact	ActorDTO	
☐ WO	com.carl.touch.dto.TaskDTO	account - Account	String	
☐ WO	com.carl.touch.dto.TaskDTO	customList - customList	String	



Adding or deleting a specific attribute on the list will change the custom forms of CARL Touch.

30.5. Update the form customization.

Once the specific attributes have been configured, form customization needs to be finalized by placing the new attributes in the desired blocks. This is because, as default, new attributes are positioned at -1 and are not displayed.

Custom forms > Detail of the custom form

CUSTOM FORM DETAIL : TASK-CUST - TASK DETAIL FORM

↩

✓

This detail form allows you to customize a CARL Touch form by copying a standard form. For each attribute of the form, it is possible to: ...?

General

CodeTASK-CUSTNameTask detail form

Form

FunctionalityTâchesFormTask detail

Created byDOEBy DefaultStandard

Fields list

Fields list

<< < from 1 to 16 of 144 > >>

SEQ.	ATTRIBUTE	NAME	DISPLAYED	LIST	MANDATORY	EDITABLE	DUPLICATED	SCANNABLE	VALUES LIST	SUMMARY
☐	-1 account	Unknown label	☐	☐	☐	☐	☐	☐		☐
☐	-1 contact	Unknown label	☐	☐	☐	☐	☐	☐		☐
☐	-1 customList	Unknown label	☐	☐	☐	☐	☐	☐		☐
☐	0 description	Name	☒	☒	☐	☒	☐	☐		☐
☐	10 BLOCK	General	☒	☐	☐	☒	☐	☐		☐
☐	20 createdBy	Created by	☒	☐	☐	☒	☐	☐		☐
☐	30 workPriority	Priority	☒	☐	☐	☒	☐	☐	PRIORITYLEVEL	☐
☐	35 workCategory	Category	☐	☐	☐	☒	☐	☐	WORKCATEGORY	☐
☐	40 actionType	WO Activity type	☒	☐	☒	☒	☒	☒		☐
☐	50 taskBegin	Start date and time	☒	☐	☒	☒	☒	☒		☐
☐	60 taskEnd	End date and time	☒	☐	☒	☒	☒	☒		☐
☐	70 expectedTime	Estimated time	☒	☐	☐	☒	☐	☐		☐
☐	80 BLOCK	Equipments	☒	☐	☐	☒	☐	☐		☐
☐	90 locationBox	Location	☒	☒	☐	☒	☐	☐		☐
☐	100 mainBox	Main point	☒	☒	☐	☒	☐	☐		☐
☐	110 referMaterial	Referring asset	☐	☐	☐	☐	☐	☐		☐

Upon saving the form, the new attributes will be available in the CARL Touch application.

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31. CUSTOMIZING THE VOCABULARY

To configure the **vocabulary relating to names** on CARL Touch **forms**, the « *Configure names* » action on the custom form detail screen (as described in section [General tab](#)) is used.

To customise the CARL Touch vocabulary more generally, however (e.g. **button titles** and **application messages**, etc.), the CARL Source « **Dictionary** » must be used.

To customize the overall CARL Touch vocabulary via CARL Source, proceed as follows:

1. In CARL Source, go to the « *System* » -> « *Customization* » menu.
2. Choose the « *Customized names* » feature.
3. The « *Criteria* » tab can be used to set search criteria corresponding to the term to be searched for and changed (Original text, Code, etc.):

The screen below, for example, shows the « *Results* » tab with the « *Code* » criterion set to « **TOUCH** » (to obtain all vocabulary relating to CARL Touch):

Criteria Result						
Filter Sort Refresh Print Export Delete						
Result						
CODE	LANGUAGE	ORIGINAL TEXT	CUSTOMIZED TEXT	FILE	DOMAIN	
☐ abort_init	English	Do you want to abandon CARL Touch initialization?		com.carl.touch.touch	Default	
☐ about	English	About		com.carl.touch.touch	Default	
☐ account_parameters_pending_messages_sub	English	List of pending tasks		com.carl.touch.touch	Default	
☐ account_parameters_title	English	Account settings		com.carl.touch.touch	Default	
☐ account_parameters_touch_about_sub	English	Version, update and support		com.carl.touch.touch	Default	
☐ activity_name_processes	English	Operation detail		com.carl.touch.touch	Default	
☐ actor_not_a_technician	English	You are not a technician. Trip labor reporting cannot be entered.		com.carl.touch.touch	Default	
☐ add_charact	English	Add a characteristic		com.carl.touch.touch	Default	
☐ add_charact_from_list	English	Based on the list		com.carl.touch.touch	Default	
☐ add_charact_from_sheet	English	Based on a sheet		com.carl.touch.touch	Default	
☐ add_consumption	English	Add a consumption		com.carl.touch.touch	Default	
☐ add_cure	English	Select another remedy		com.carl.touch.touch	Default	
☐ add_delivery	English	Add a delivery		com.carl.touch.touch	Default	
☐ add_document	English	Add a document		com.carl.touch.touch	Default	
☐ add_entry	English	Re-integrate in stock		com.carl.touch.touch	Default	
☐ add_failureCause	English	Select another cause		com.carl.touch.touch	Default	
☐ add_occupation	English	Add labor reporting		com.carl.touch.touch	Default	
☐ add_process	English	Add an operation		com.carl.touch.touch	Default	
☐ add_symptom	English	Select another symptom		com.carl.touch.touch	Default	
☐ add_tool	English	Add a tool/eqpt.		com.carl.touch.touch	Default	

The user then chooses the original message, description or title and associates a customized version using the « **Customized text** » field:

Result					
Filter Sort Refresh Print Export Delete					
CODE	LANGUAGE	ORIGINAL TEXT	CUSTOMIZED TEXT	FILE	DOMAIN
☐ prefs_touch_search_update	English	Search for an update		com.carl.touch.touch	Default



To view the changed vocabulary in CARL Touch, the **data must be reinitialized** on the mobile device.

32. CUSTOMIZING THE TRANSFER ACTION

When several task transfer types are available, the « **Configure transfer action** » action should be used.

To customise task transfer in CARL Touch via CARL Source, proceed as follows:

1. In CARL Source, go to the "CARL Touch" -> "Configuration" menu.
2. Choose the "Transfer a task" feature.
3. The « *General* » tab offers four standard transfer types:

SEQ.	CODE	NAME	ADDRESSEE	COMMENTS	STANDARD	AUTHORIZED
☐	1	ACTOR	Agent	☒	☒	☒
☐	4	SCHEDULE	Schedule	☐	☒	☒
☐	3	SKILL	Skill	☐	☒	☒
☐	2	TEAM	Team	☐	☒	☒

The user can add new transfer types, and thus manage those that are to be «Authorized» in CARL Touch, with or without comments.

33. CONFIGURING THE ACTIVITIES OF A TASK

When you conduct other activities at the same time as the task (for example, Lockout from service, Travel, etc.), the **Configure the activities of a task needs to be used**.

These activities in CARL Touch are customized via CARL Source as follows:

1. In CARL Source, go to the "CARL Touch" -> "Configuration" menu.
2. Choose the "Activities of a task" feature.
3. The « General » tab offers one standard activity:



The user can add new activities and thus manage what he/she wishes to «Authorise» in CARL Touch.

34. TELEASSISTANCE MODULE

The Teleassistance module is an optional licensed module. Its availability depends on your configuration.

34.1. Teleassistance Configuration

This paragraph describes the configuration settings for the Remote assistance module.

34.1.1. Purchasing the Teleassistance Module

Access to the teleassistance module requires a license purchase.

If the customer purchases teleassistance licenses, an XML file is provided to enable teleassistance.

The "Teleassistance Access" parameter is added to the profile permissions.

34.1.2. Access to Teleassistance Features

Users can configure access to teleassistance by enabling the profile parameter "Teleassistance Access".

The screenshot shows the 'DÉTAIL DU PROFIL' for 'CARL' in the 'CARL SOFTWARE DÉVELOPPEMENT' application. The 'Paramètres' tab is selected, showing a table of permissions. The 'Accès à la téléassistance' parameter is highlighted with a red box and has a checked checkbox in the 'VALEUR' column.

LIBELLÉ	VALEUR
Synchronisation des tâches	☒
Synchronisation du suivi d'activité	☒
Synchronisation des affectations	☒
Synchronisation des matériels	☒
Synchronisation des points principaux	☒
Synchronisation des localisations	☒
Synchronisation des modèles	☒
Synchronisation du module stock	☒
Synchronisation des réceptions	☒
Recensement matériel	☒
Accès à la téléassistance	☒

With this parameter, authorized users will have access in CARL Source to:

- The "Experts" tabs displayed in the Equipment, Model, and Model Family features.
- The "Expert" checkbox displayed in the Actor feature.
- The "Teleassistance Call" checkbox displayed in the Technician feature.
- The "Report History" action available in the Work Order and Equipment features.

And in CARL Touch:

- The "Teleassistance" button displayed in the task detail view to access the reports.
- The "Report History" actions for equipment.

34.1.3. Access to Teleassistance Calls

Users can configure teleassistance call authorization by enabling the "Teleassistance Call" checkbox in the Technician feature.

With this parameter, authorized users will have access in CARL Touch to:

- The "Teleassistance" button displayed in the task detail view to show the list of experts (and initiate a teleassistance call)

34.2. Configuring Experts

In CARL Source, users can configure experts to be contacted for teleassistance calls. These experts may be internal to the company (such as managers, colleagues, etc.) or external (such as suppliers, manufacturers, etc.).

An expert does not need to have an account in CARL Source or CARL Touch. The teleassistance call will be made on their side via a web application.

34.2.1. Declaring an Actor as an Expert

Users can define the list of contacts to be reached through teleassistance in the Actor feature. An actor in Active status, defined as an Expert, will be offered as a contact during the teleassistance call.

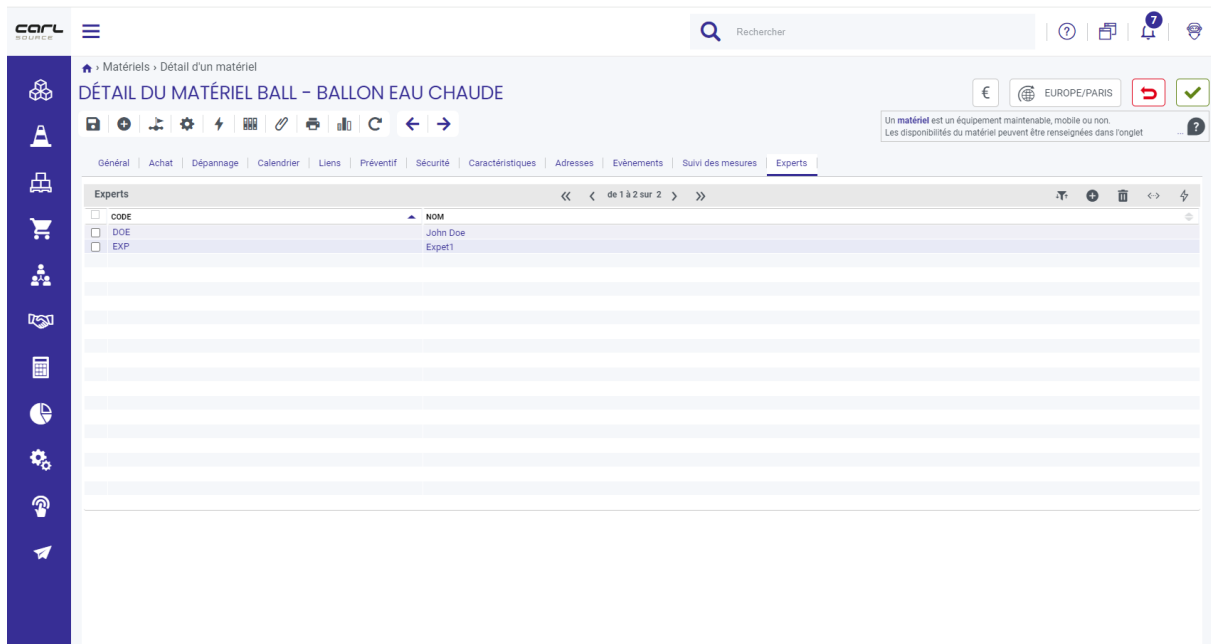
Entering an email address is mandatory for actors defined as experts.

34.2.2. Associating Skills to an Expert

Each defined expert can be associated with:

- a piece of equipment
- a structure node
- a location
- an equipment model
- a model family

In each of these features, a new tab is displayed where the user can associate one or more experts with the entity.



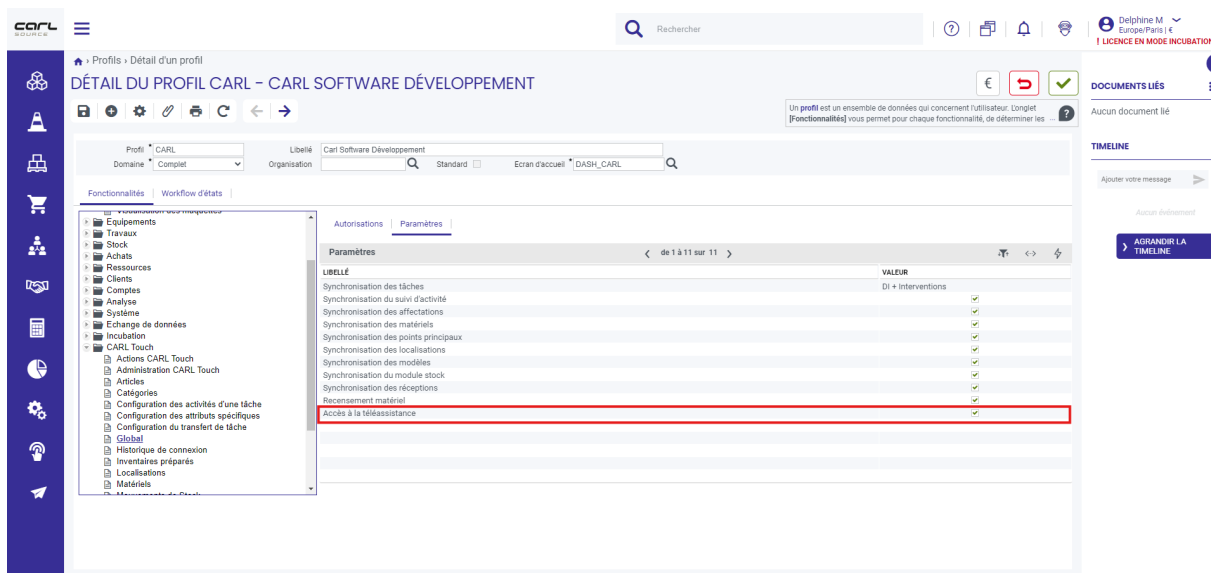
34.3. Teleassistance Call

This chapter explains how the technician can initiate a teleassistance call and how to use the teleassistance module:

- Permissions
- Starting the call from CARL Touch
- Teleassistance module on the technician's side
- Viewing the teleassistance report

34.3.1. Access Rights for Teleassistance Call

Access to the teleassistance call is governed by a profile permission (defined in CARL Source).



34.3.2. Starting the Call from CARL Touch

From a work order in the Acknowledged or Started status, the teleassistance button is displayed.

When the user presses the Teleassistance button , the Teleassistance menu appears:

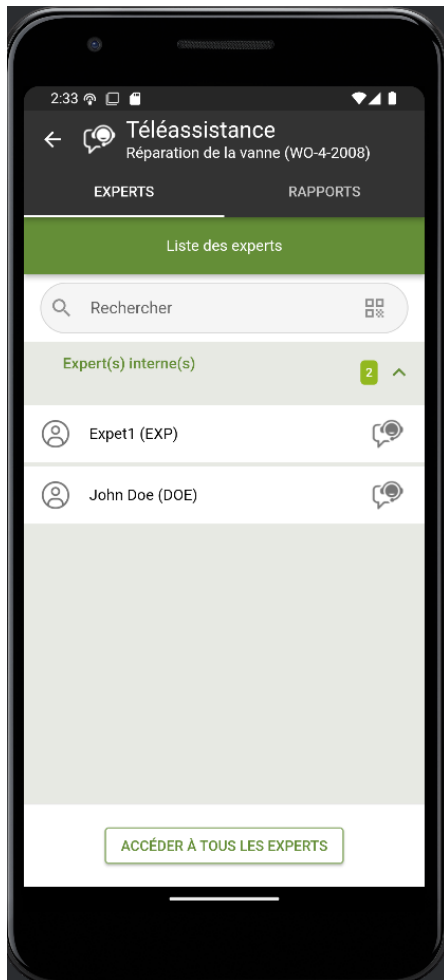
- List of experts

- Report history

To initiate a teleassistance call, the user selects the "List of experts" menu.

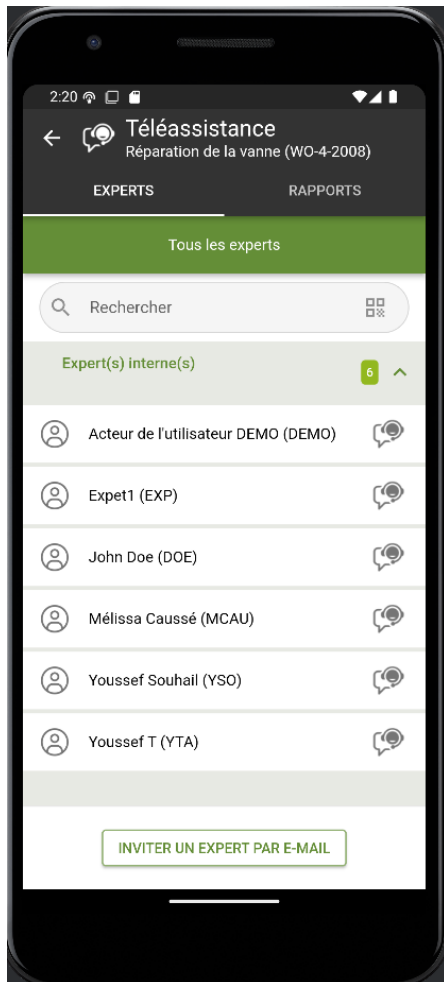
The screen then shows the list of qualified experts for the work order, meaning:

- Experts linked to the equipment involved in the work order
- Experts linked to the location of the equipment
- Experts linked to the structure node
- Experts linked to the equipment model
- Experts linked to the model family



This screen is only shown if competent experts have been defined. Otherwise, the following screen is displayed directly.

If the user presses the "Access all experts" button, the next screen appears, showing the full list of experts defined in CARL Source.



When the user presses the teleassistance icon , an invitation email is sent to the expert. The body of the message is defined in the message template **TMPL_RAINVITATION**.

If the user presses the "Invite an expert by email" button, they can enter the name and email address of the expert to send the invitation directly (without having to declare the expert in CARL Source).

Ajouter un e-mail

Nom et prénom de l'expert

Adresse e-mail

ANNULER INVITER

34.3.3. Teleassistance Module on the Technician's Side

Login Screen

After selecting the expert, the user arrives on the teleassistance session login screen.



On this screen, the user can:

- Enable or disable the microphone
- Enable or disable the camera
- Cancel the call
- Join the teleassistance session

When the user presses the "Join Now" button, the teleassistance module opens.

Teleassistance Call Screen

The features available during the call allow the user to:

- Take a photo
- Mute/unmute the microphone
- Mute/unmute the speaker
- Turn the camera on/off
- Switch between front and rear camera
- End the call



When the user takes a photo, the video feed is frozen for both participants.

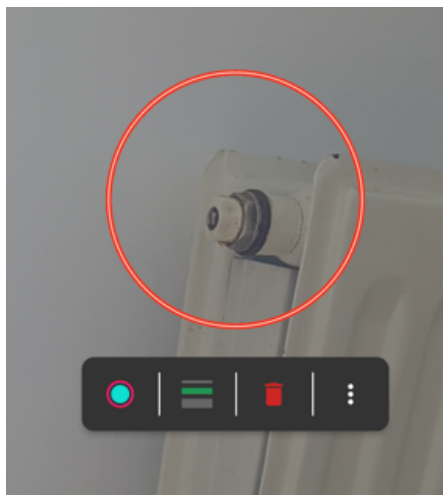
Annotation Screen

Annotation features allow the user to:

- Select the pencil for freehand annotations (with color and stroke thickness options)
- Select a shape for annotations (with color and stroke thickness options)
- Delete added annotations



When selecting an annotation, a contextual menu appears allowing the user to modify it.

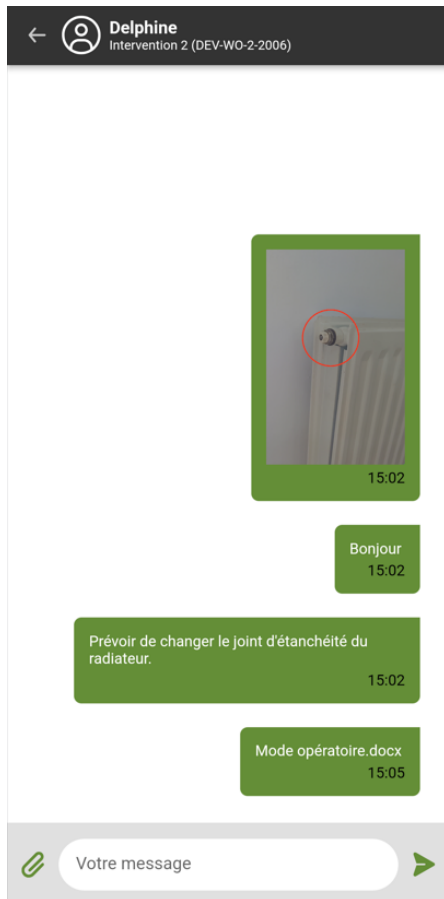


The annotation menu is only visible in photo mode. Annotation is not possible in video mode.

Chat

The user can also use the chat to communicate in writing using the icon 

In the chat, participants can exchange text messages as well as documents stored on the device or retrieved from CARL Touch (for the technician).



34.3.4. Viewing the Teleassistance Report

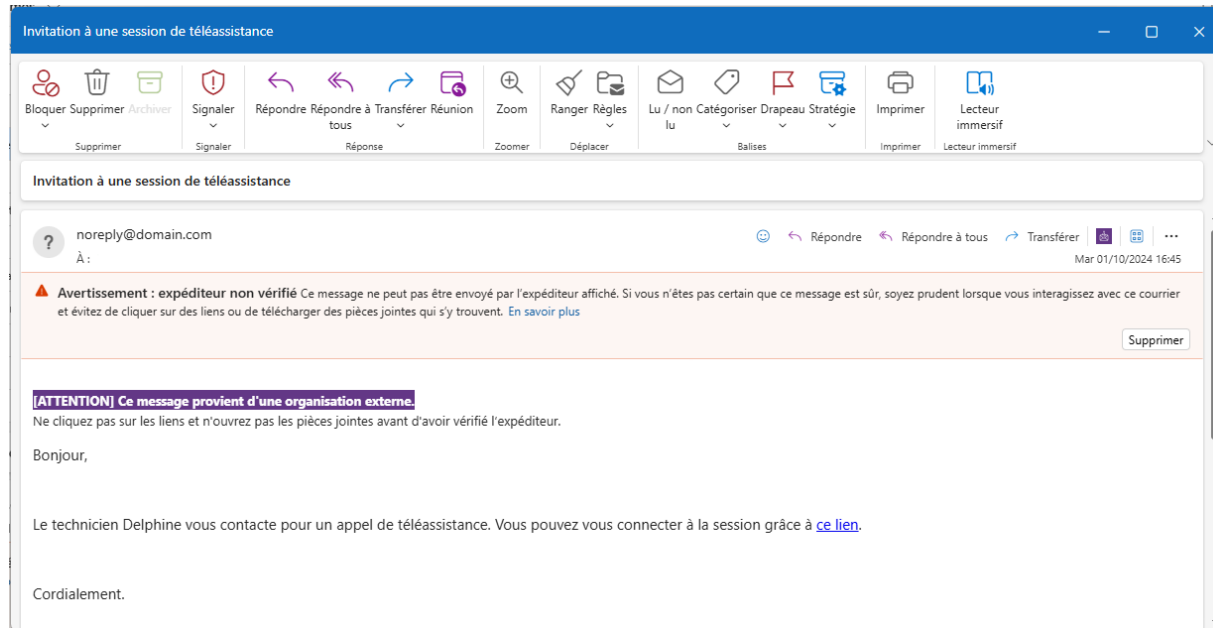
At the end of the teleassistance call, the technician can view the teleassistance report, which is saved in CARL Source.



34.3.5. Teleassistance Module on the Expert's Side

Expert Invitation

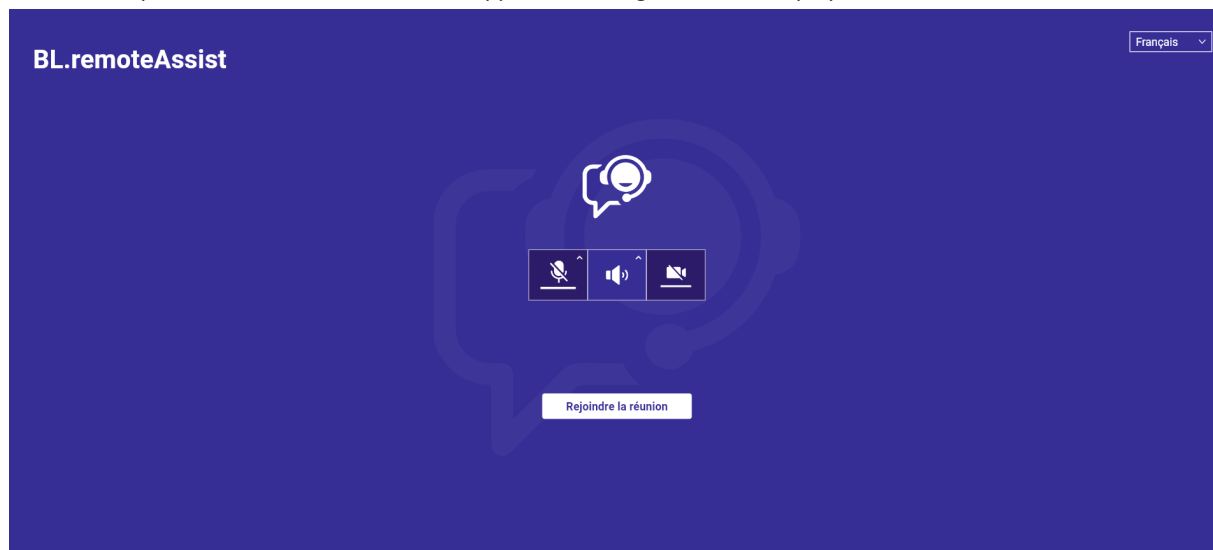
The expert receives an invitation email sent by the CARL Touch application. By clicking the link in this email, they can join the teleassistance session.



The expert can select their preferred language from the list in the top right. By default, French is proposed.

Login Screen

When the expert accesses the teleassistance application, a login screen is displayed.

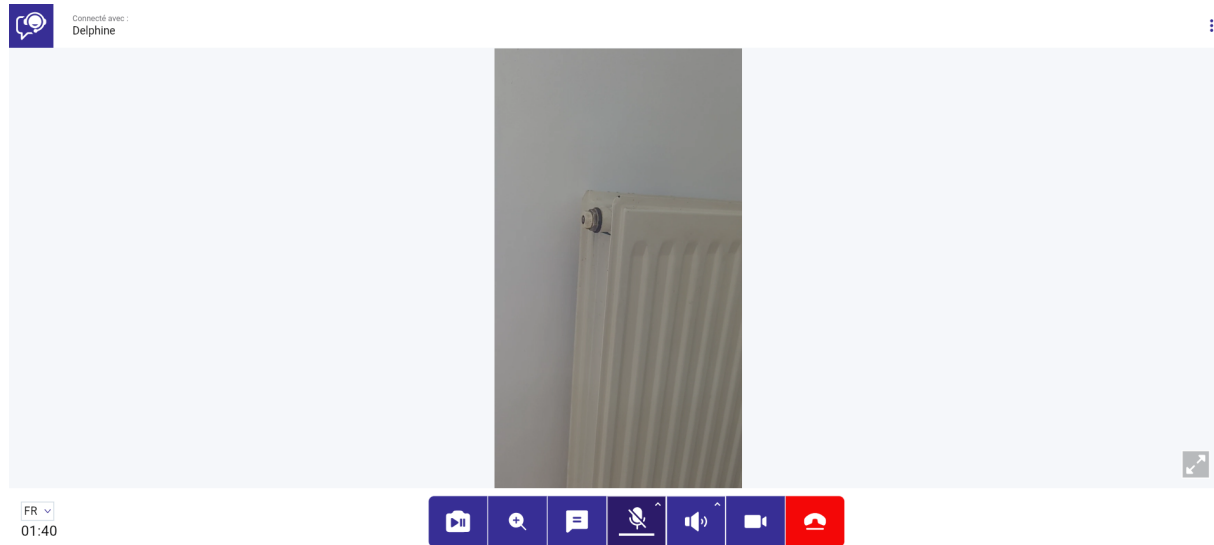


On this screen, they can:

- Change the language
- Enable or disable their microphone
- Enable or disable the speaker
- Enable or disable the camera
- Join the teleassistance session

Teleassistance Call Screen

When they press the "Join the session" button, the teleassistance call screen appears:



At the top of the screen, the name of the contacted technician is displayed.

In the bottom menu, the expert can:

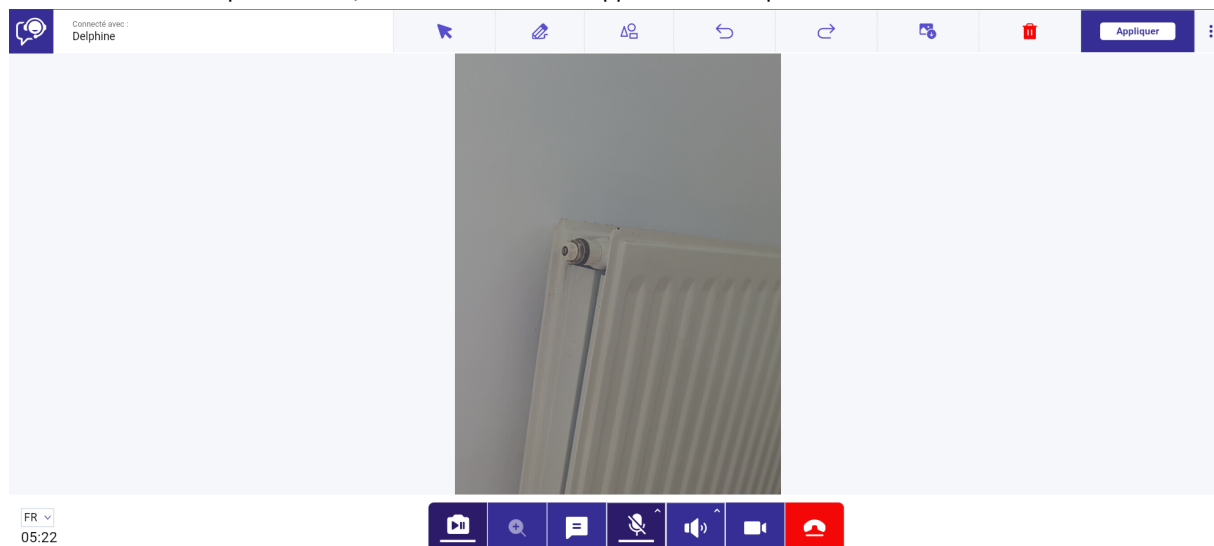
- Take a photo / freeze the image
- Zoom the image
- Access the chat
- Enable or disable the microphone
- Enable or disable the speaker
- Enable or disable the camera
- End the call

The icon  allows the expert's camera to be displayed.

Annotating a Photo

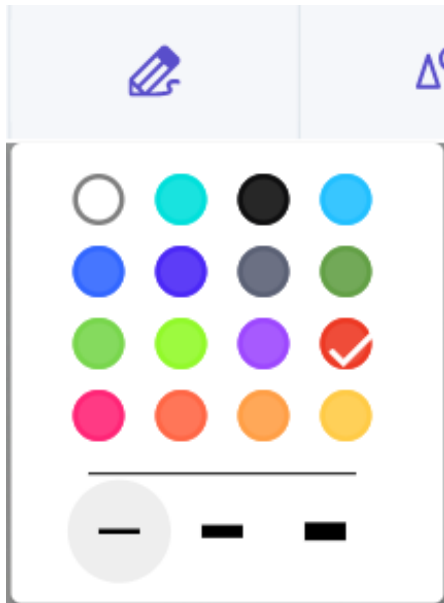
The expert or technician can freeze the video to take a photo. Only the person who froze the video can exit photo mode.

When the call enters photo mode, the annotation menu appears at the top of the screen:

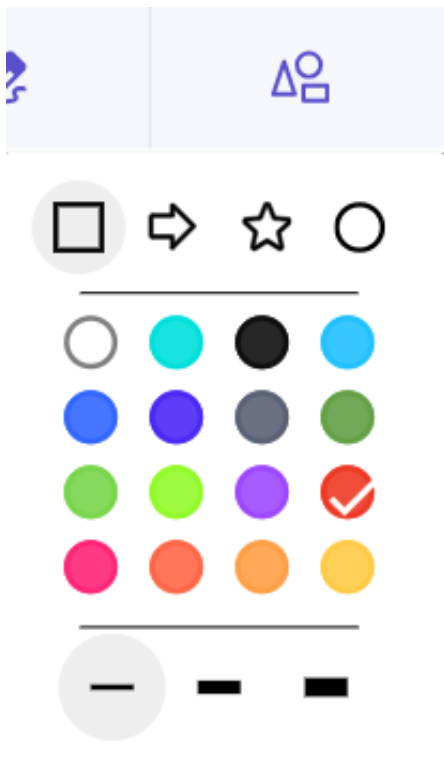


The annotation menu allows:

- Selecting an existing annotation (to move or modify it)
- Drawing freehand with selectable color and stroke size

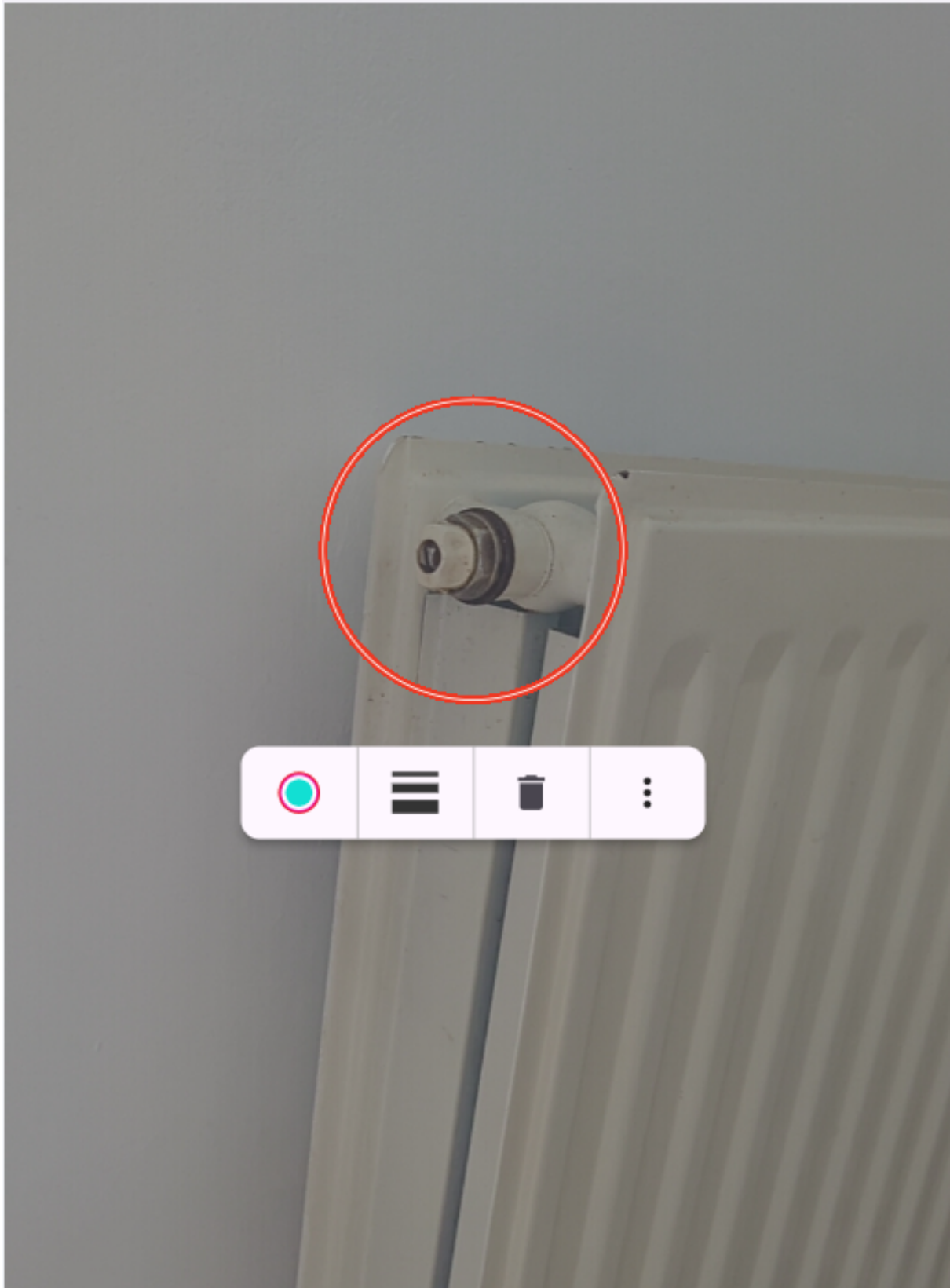


- Annotating with shapes by selecting the shape, color, and stroke size



- Undoing the last annotation
- Redoing the last undone annotation
- Deleting all annotations

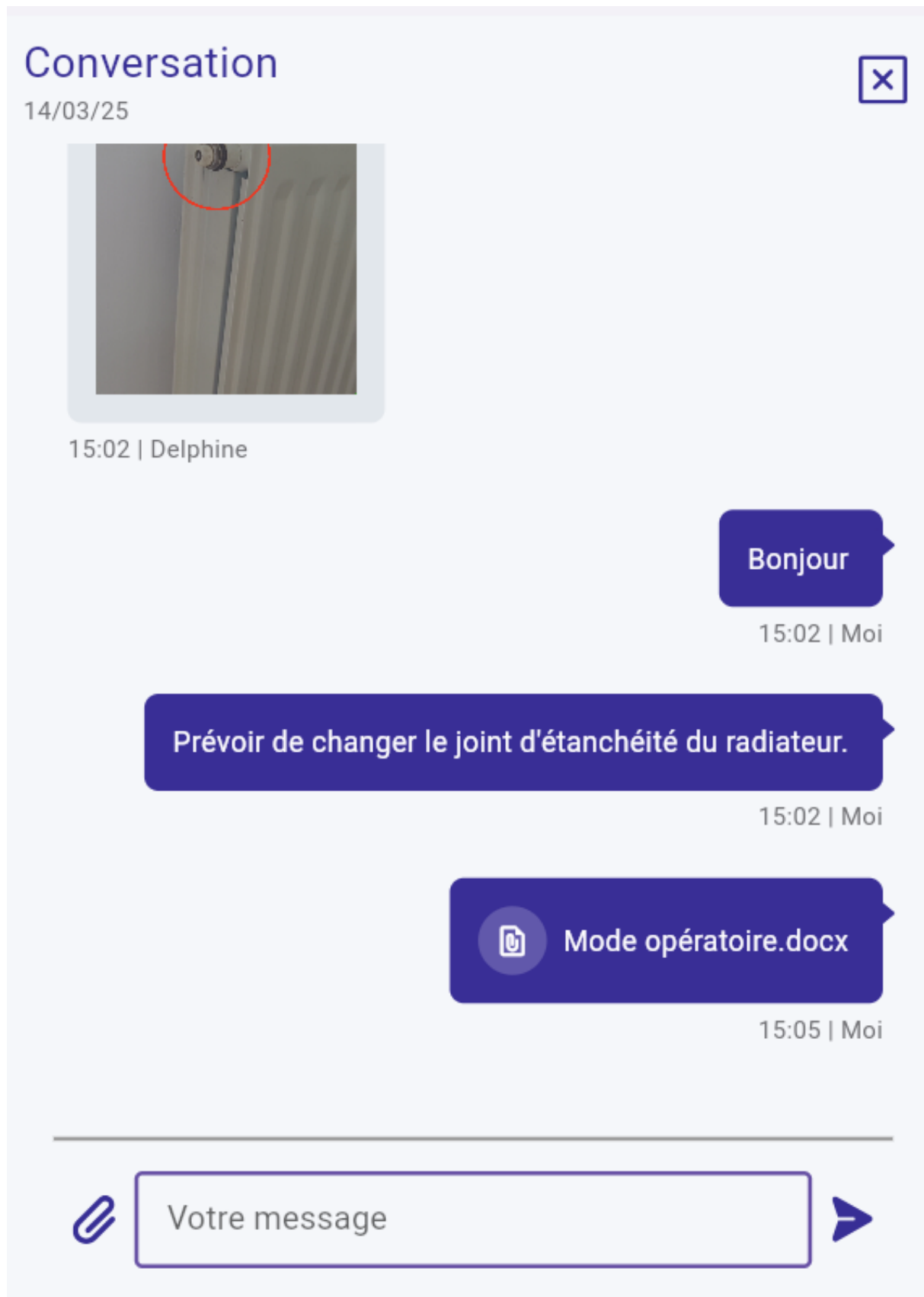
When the expert selects an existing annotation, a contextual menu appears allowing it to be modified.



Chat

In the chat feature, the expert can:

- Exchange text messages
- Share files
- View annotated photos



34.3.6. Viewing Teleassistance Reports in CARL Touch

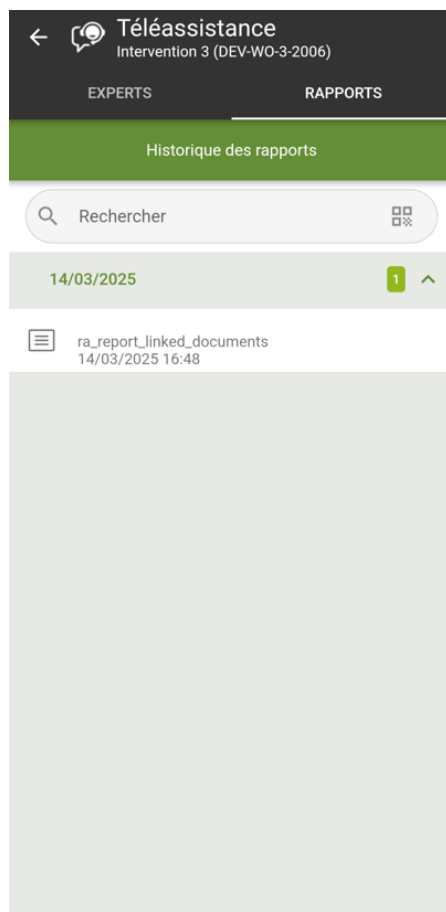
Viewing Reports from a Work Order

From a work order in the Acknowledged or Started status, the teleassistance button is available.

When the user presses the Teleassistance button , the Teleassistance menu appears:

- List of experts
- Report history

When the user presses the "Report History" label, the following screen is displayed:



It lists all existing teleassistance reports for this intervention. Each call generates a report.

In a teleassistance report, the user can view:

- The date and time of the teleassistance call
- The participants of the call
- The chat messages exchanged
- The files exchanged via chat
- The annotated photos shared

The user cannot modify a teleassistance report from CARL Touch.

Viewing Reports from Equipment

From an equipment record, a new action "Report History" is available.

The list of reports related to the equipment is displayed. The user can open the report detail by clicking on a line.

34.3.7. Viewing Teleassistance Reports in CARL Source

Teleassistance Report Feature

In the Interventions / Management menu, a new feature "Teleassistance Reports" is available.

Like other CARL Source features, it includes a "Criteria" tab for entering search filters, and a "Results" tab listing the teleassistance

reports.

When the user selects a report, a screen with "General" and "Detail" tabs appears.

In the General tab, all key information about the report is available:

- Report code and label
- Work order code and label
- Technician name
- Expert name
- Equipment linked to the report
- Start and end date and time of the call
- Call duration

In the Detail tab, information exchanged during the chat is displayed:

- Text messages
- Annotated photos
- Files exchanged

Un rapport téléassistance vous permet de visualiser les échanges effectués lors de l'appel téléassistance.

MESSAGE	PIÈCE JOINTÉ	ÉMETTEUR	DATE
annotationimage.png		Delphine	14/03/2025 16:49:49
Bonjour		Delphine	14/03/2025 16:50:04
prévoir de changer le joint d'étanchéité...		Delphine	14/03/2025 16:50:46

Aucun événement

AGRANDIR LA TIMELINE

"Teleassistance History" Action from Interventions

In the Work Order feature, via the Follow-up icon, a new action "Teleassistance History" is available.

This action displays the Results tab of teleassistance reports, filtered by the initial work order code.

"Teleassistance History" Action from Equipment, Model and Model Family

In the Equipment, Location, Structure Node, Model and Model Family features, a new "Teleassistance History" action is available via the Follow-up icon.

This action displays the Results tab of teleassistance reports, filtered by the selected entity's code.