

iOS Engineer App

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Table of Contents

1	iOS Engineer App User Guide	6
1.1	Introduction	6
1.2	Installation	6
1.2.1	Installation Guide	6
1.2.2	Set as Trusted App	8
1.3	Registration, Change Password and Logging In	10
1.3.1	Registering as a New User	10
1.3.2	Change Password Page	11
1.3.3	Logging In	Error! Bookmark not defined.
1.3.4	Removing Users	14
1.4	Navigation	15
1.4.1	Navigation Links	15
1.4.2	Tab Bar Links	16
1.5	Sync	16
1.6	Scan	18
1.6.1	Scan History	19
1.7	Search	20
1.7.1	Equipment and Components	20
1.7.2	Branches	21
1.7.3	Site Visit Reports	21
1.7.4	Works Orders	22
1.7.5	Service Contracts	23
1.8	Branch Details	23
1.8.1	Branch Equipment	24
1.8.2	Site Visit Reports	24
1.9	Equipment Details	25
1.9.1	Editing Equipment Items	26
1.9.2	Adding a Profile Image	27
1.9.3	Components	28
1.9.4	Equipment Documents	29
1.9.5	Site Visit Reports	29
1.9.6	Test Sessions	29

1.9.7	Tagging a New Equipment Item	29
1.9.8	Components	29
1.9.9	Equipment Documents	33
1.10	Site Visit Reports	35
1.10.1	Editing a Site Visit Report	36
1.10.2	Editing a Site Visit Report	36
1.11	Test Documents	50
1.11.1	Background	51
1.11.2	Enabling Test Documents in the App	51
1.11.3	Test Sessions Screen	51
1.11.4	Creating a New Test Session	52
1.11.5	Test Certificate	53
1.11.6	IBAR Installation Tests	70
1.11.7	IBAR Installation Joint Tests	73
1.11.8	RESINBAR Installation Joint Tests	81
1.12	Time Logs	91
1.12.1	Time Logs Screen	91
1.12.2	Adding a New Time Log	92
1.12.3	Deleting a Time Log	93
1.12.4	Syncing Up Time Logs	94
1.12.5	Arriving At or Leaving Site	94
1.12.6	Arriving In or Leaving a Country	100
1.12.7	Logging Additional Project Time	105
1.12.8	Logging Non-Project Time	111
1.12.9	Logging Work	115
1.13	Settings	123
1.13.1	Changing App Settings	124
1.13.2	Sending Debug Information	124
1.14	Support	125
1.15	Troubleshooting	126
2	Release Notes	130
2.1	v4.1.0	130
2.1.1	Sync	130
2.1.2	Site Visit Reports	130
2.1.3	CPS Documents	131

2.1.4	Creating Equipment Items	133
2.1.5	Required Fields	134
2.2	v4.1.3	134
2.2.1	CPS Documents	135
2.3	v4.2.0	136
2.3.2	Editing Site Visit Reports, Equipment and Components	137
2.3.4	Test Sessions	138
2.4	v4.3.0	138
2.4.2	Site Visit Reports	139
2.4.3	Tagging Equipment	140
2.5	v4.4.0	140
2.5.2	Test Sessions	141
2.6	v4.5.0	143
2.7	v4.6.0	144
2.7.1	Test Sessions	144
2.7.2	Search	145
2.7.3	Site Visit Reports	145
2.7.4	Scan History	145
2.7.5	Sync Warning	145
2.8	v4.7.0	146
2.8.1	System Icons	146
2.8.2	Site Visit Reports	146
2.8.3	Service/Test Documents	147
2.8.4	Test Sessions	147
2.9	v4.8.0	147
2.9.1	Site Visit Reports	147
2.9.2	Site Visit Reports and Test Sessions	148
2.9.3	Equipment and Component Details	148
2.9.4	Databar Installations	148
3	iOS Engineer App Quick Start Guide	150
3.1	Launching and Logging In	150
3.2	Navigation	150
3.3	Finding a Site Visit Report	151

3.4	Filling in a Site Visit Report	152
3.4.1	If You Need To Add Equipment...	152
3.5	Adding Service Documents	154
3.6	Signing Off The Site Visit Report	155
3.6.1	If The Signatory Is Not Listed...	156
3.7	Syncing	157
3.7.1	If You Get Prompted To Log In...	157

1 iOS Engineer App User Guide

1.1 Introduction

A brief introduction and background to the Anord Mardix Engineer App.

iControl Engineer (otherwise known as the Engineer App) is an application for the iPhone and iPad, providing access to the complete Anord Mardix iControl database of equipment, locations, documentation and site visit reports.

The application allows site visit reports to be created and modified on-site, including service documents. In addition, details of equipment item can be updated or tagged, and electronic test certificates can be completed.

The application can be used on either iPhones or iPads, although with the introduction of electronic documentation it is recommended that wherever possible iPads should be used.

1.2 Installation

1.2.1 Installation Guide

This section describes how to install the Engineer App on a device for the first time.



The steps detailed below are used for both first time installation and subsequent updates. If you are **updating** the app, unless otherwise stated you must ensure all data is **fully synced up**, as otherwise you may lose any unsynced data.

To install the application on your device, open up the web browser on your device (this is normally Safari), and navigate to <https://appinstall.mardix.co.uk/engineer>

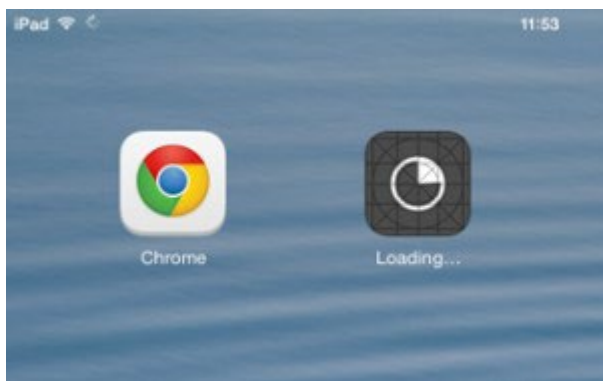


On the page that appears, tap on **Install iControl Engineer**.

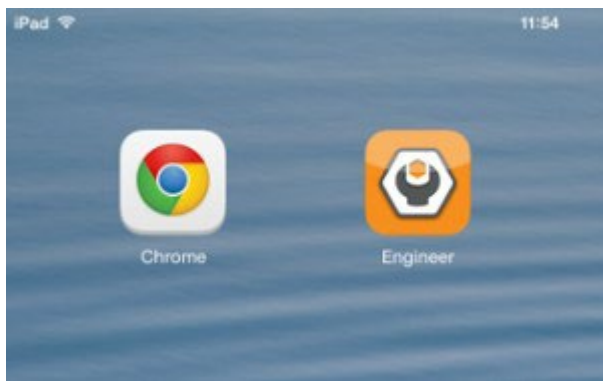
You will then be asked if you want to install the application; select **Install**.



If you now minimise Safari, you should see the application beginning to install on the desktop.



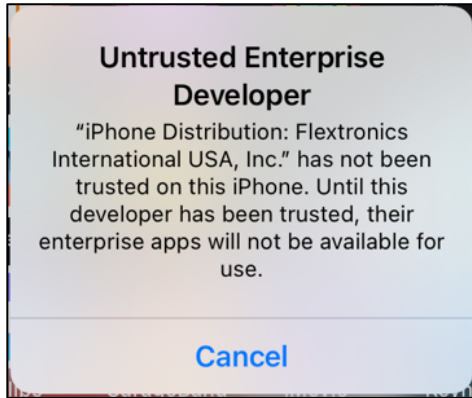
Once the application has installed, you will see the Engineer icon displayed.



You do not need to keep a note of the installation URL, as once installed you can easily find the installation web page [from within the app itself](#).

1.2.2 Set as Trusted App

After installation for the first time, on launching the app you may receive the message below (Untrusted Enterprise Developer).

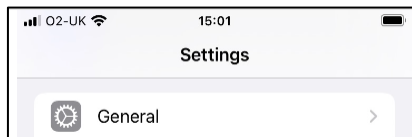


To resolve this issue:

1. Open **Settings** on the device



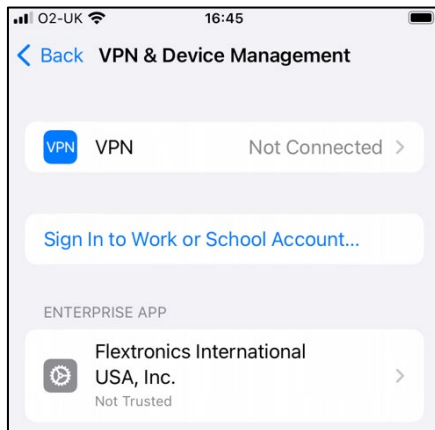
2. Select **General**



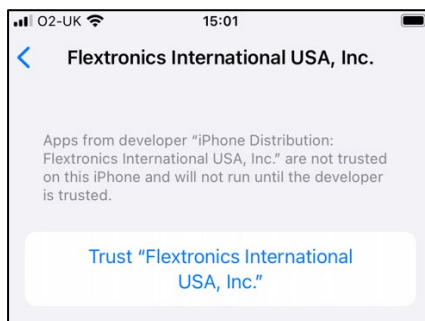
3. Select **VPN & Device Management**.



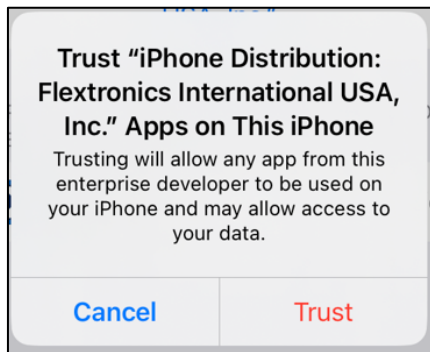
- Then select **"Flextronics International USA, Inc."** under ENTERPRISE APP section



- Tap **Trust "Flextronics International USA, Inc."**.



- Click "Trust"



- You should now be able to successfully launch the app.

1.3 Registration, Change Password and Logging In

This section describes how to register your username on the Engineer App, and how to log in if you have previously registered.



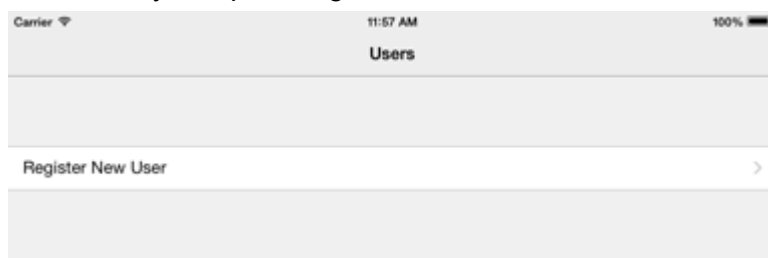
Before launching the application, it is recommended that you close any other applications or processes that you are not currently using; this is to reduce the risk of the application crashing in the event of the device running low on memory.

Upon launching the app, the first screen you will see is the Users screen. This lists all users currently registered on the app. The first time you launch the app, no users will be listed.

From this screen you can log in (if you have previously registered), or register as a new user.

1.3.1 Registering as a New User

To register, tap on **Register New User**. Note that you will need to be in wi-fi range to successfully complete registration.



Enter your Vision username and password; you should be supplied with this in advance, and your username is usually your email address, but if in any doubt contact the Anord Mardix software support team.

Tap on **Register** to submit your details; at this point you should see a small spinning icon while the app attempts to contact the Anord Mardix Vision server.

If your username and password have been accepted, you will now be prompted to enter a four-digit PIN. This PIN is a number allowing you to securely log in once you have registered. It is entirely up to you what PIN number you choose, although it is a good idea to select one that you will easily remember.

You will then be asked to confirm your PIN, after which the registration process is complete and you will find yourself on the app's [Home page](#). If your Anord Mardix password has expired and you have wifi connection, rather than the Home page, you will be taken to the Change Password Page.

1.3.2 Change Password Page

Anord Mardix passwords will expire if you are a first-time user and you have not set your own password, or your current password is now older than 70 days. If this happens once your PIN has been entered, you will be taken to the **Change Password** page.

Your password has expired

Password

Confirm Password

[Change Password](#)

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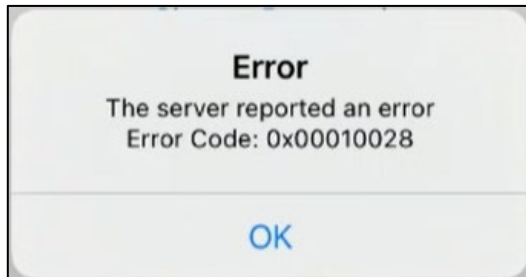
Enter your new password in the 'Password' & 'Confirm Password' fields, then click 'Change Password'. The new password will have to match the following criteria:

- Both 'Password' & 'Confirm Password' should match (case sensitive)
- Must contain at least one uppercase character
- Must contain at least one lowercase character
- Must contain at least one number
- Must be a minimum of 8 characters
- Must contain at least one special character. Any one of the below:
 . ! " £ \$ % ^ & * () - = _ + [] { } ; : ' @ , < > ? / \ ` ~ # | \
- Must not be a password previously used within you last 25 passwords

Once you have successfully changed your password, you will be taken to the app's **Home** page.

1.3.2.1 Possible Change Password Errors

Under certain circumstances the below error message may be displayed whilst attempting to submit and change a password.



Password token has expired: The Engineer App allows a user to remain inactive on the Change Password page for a maximum of 5 minutes before submitting a new password. In the event of this time being exceeded, the above error will be displayed. You will be required to re-submit and change your password again within 5 minutes.

Password has already been used: A user may not use any of their previous 25 Anord Mardix Vision passwords. If you do enter a password within the last 25 previously used passwords, the above error will be displayed. You will be required to re-enter a new password that has not previously been used.

1.3.3 Logging In

Once you have successfully registered your username, whenever you launch the app in future you will see your username listed on the Users screen. To log in, simply tap on your username.



You will then be prompted to enter the PIN number you set up when you registered. You do not need to be in wi-fi range when logging in.

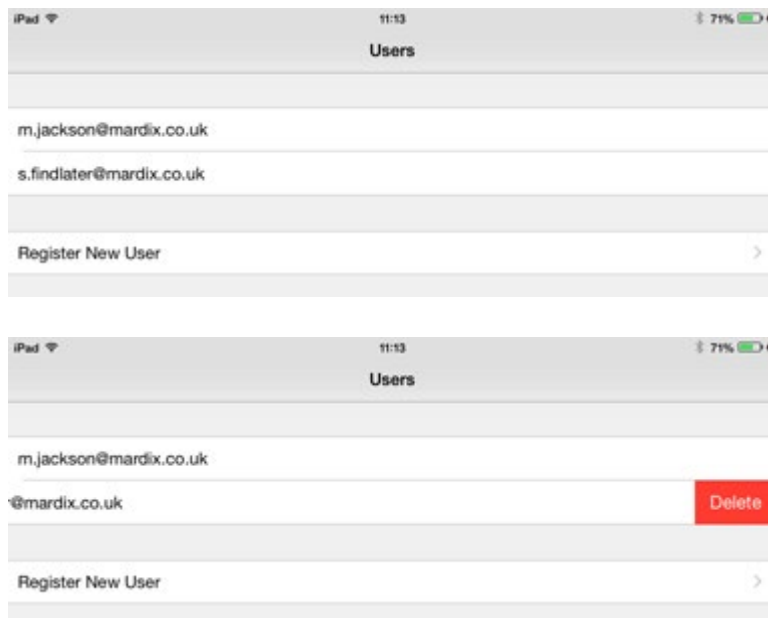


If your Anord Mardix password has expired and you have wifi connection, you will be taken to the Change Password page (see the section above).

If your Anord Mardix password has expired and you do not have wifi connection, you will not be prompted to change password and able to use the app as normal. You will be prompted to change your password the next time you have wifi connection when entering your PIN.

1.3.4 Removing Users

To remove a user from the device, carefully and slowly swipe right-to-left from the right hand side of the user's name cell. This will reveal a hidden **Delete** button that can then be used to remove the user from the device. Users can be added back in again by following the registration steps above.

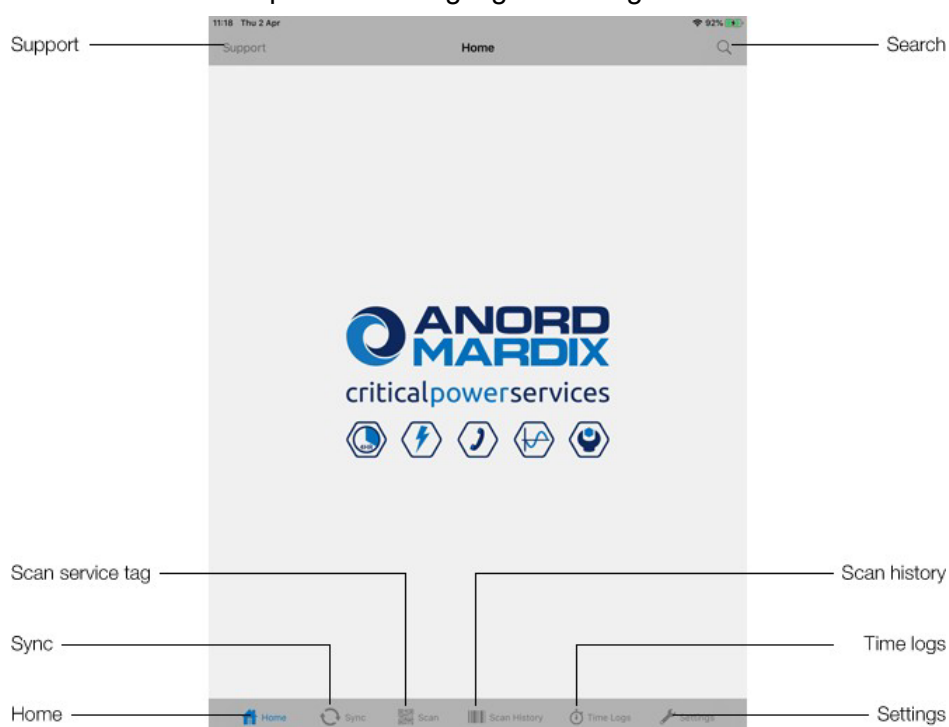


1.4 Navigation

The basics of how to navigate around the Engineer App.

Navigation in the Engineer App is generally performed by using tabs at the bottom of the screen, which always remain the same wherever you are in the app; and by using navigation links at the top of the screen, which tend to change depending on which screen you are currently on.

The first screen you will encounter after registering or logging in is the Home screen, which is shown below. A description of the highlighted navigation controls follows.



1.4.1 Navigation Links

These appear at the top of the screen, and normally allow you to navigate backwards and forwards between related pages. They are almost always specific to the screen you are currently on. The navigation links on the Home screen are as follows.

- **Support** takes you to a screen providing details of how to contact the Anord Mardix software support team
- **Search** allows you to search the app for equipment, branches or site visit reports

1.4.2 Tab Bar Links

The tab bar at the bottom of the screen contains a fixed set of links that remain the same regardless of where you are in the app.

- **Home** takes you back to the Home screen
- **Sync** takes you the Sync screen, from where you can refresh the app's data or submit any updates you have made
- **Scan** allows you to scan a service tag to bring up details of the associated equipment item
- **Scan History** brings up a history of all recent service tags you have scanned
- **Time Logs** allows you to log time related to site works
- **Settings** takes you to the Settings screen, allowing you view application information and change some settings



Note that some screens (such as Equipment Details) can be accessed from more than one tab; tapping on a tab will take you to the last screen you were on the last time you were in that tab. In other words, each tab maintains its own 'navigation history' at all times, allowing you to switch between tabs without losing where you were.

If you want to navigate to the main screen for a particular tab (e.g. Home), simply **double-tap** on that tab.

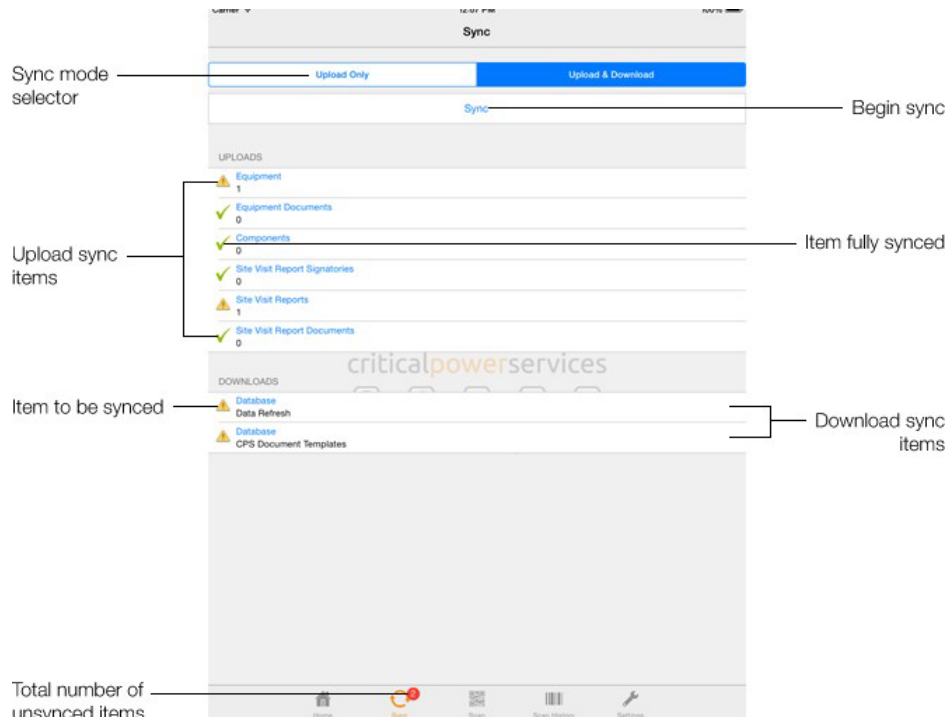
1.5 Sync

The Sync mechanism is used to keep the app's data up to date with the Anord Mardix Vision server. This section describes the steps for running a sync.

The Sync function is used when you want to send up any changes you have made to the Anord Mardix Vision server, or when you want to refresh the app's data and bring down the latest changes from the server. Any changes you send up are instantly updated on the Vision system.



When you install the application for the first time, the first thing you will need to do is start a full download sync as the local database will be empty to begin with.



All sync items are listed on the Sync screen. These consist of upload items (which are things that you can modify within the app such as equipment and site visit reports), and a download section consisting of a general data refresh and some document templates.

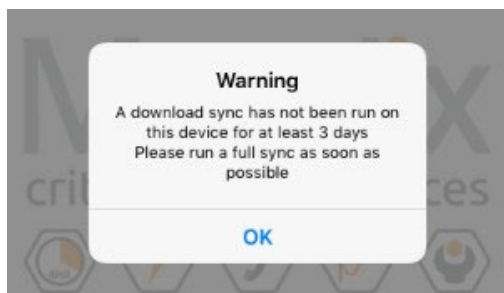
Items that are either fully synced (or do not currently require syncing), display with a green tick; items that are not yet synced are displayed with a yellow triangle. In addition, a red badge on the **Sync** tab icon at the bottom of the screen will display the total number of items waiting to be synced up.

You can select the sync mode at the top of the screen.





- **Upload Only** means you are only wanting to send up changes you have made without refreshing the app's data; this would normally be used if you need to quickly submit some changes
- **Upload & Download** runs a full sync, firstly submitting any changes you have made, before then bringing down a full data refresh from the server; this may take a few minutes to complete, and is usually done at the beginning or end of the day



Although you do not need to run a full download sync every time, it is recommended that you still do this fairly regularly to always ensure the information on the app is as up-to-date as possible. If a full download sync has not been run for some time, a warning will appear at startup.



To begin a sync, simply tap on the **Sync** button. You should see each unsynced item in turn display a spinning icon, before displaying a green tick. The full list of icons displayed during a sync cycle is as follows.

-  Item yet to be synced
-  Item in the process of syncing
-  Item successfully synced, or no sync required
-  Item failed to sync

If all has gone OK, every synced item should now display a green tick. If a problem was encountered syncing any of the items, a red cross will be displayed instead; this is most often caused by a drop-out in the wi-fi signal. If this happens, consult the [troubleshooting guide](#).



It is important that you only attempt a sync when you are in range of a good wi-fi signal, as this process can involve sending large amounts of data over an internet connection. Although any items that fail to sync will always be retried on subsequent sync attempts, having a good uninterrupted signal should guarantee the sync succeeds.

If an upload sync item succeeds, you can be certain that the data has been transferred successfully, as the green tick only appears once confirmation has been received from the server that the data transfer has completed.

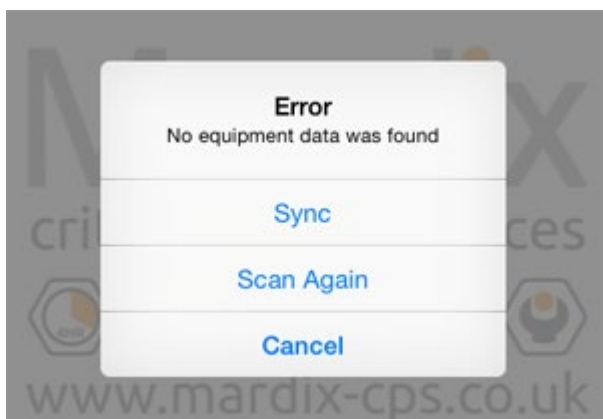
1.6 Scan

The Scan option allows you to bring up the details of a piece of equipment by scanning its service tag, and is the usual method of accessing an equipment item in the Engineer App.

The scanner works just like the device's camera, except that once the device has a service tag QR code within its viewfinder, it will automatically detect it and take you straight to the associated [Equipment Details](#) or [Component Details](#) screen.



In the event that the QR code does not represent a valid piece of Anord Mardix equipment, you will receive an alert and be prompted to either scan again, go to the [Sync](#) screen to get an updated list of equipment, or simply cancel the scan.

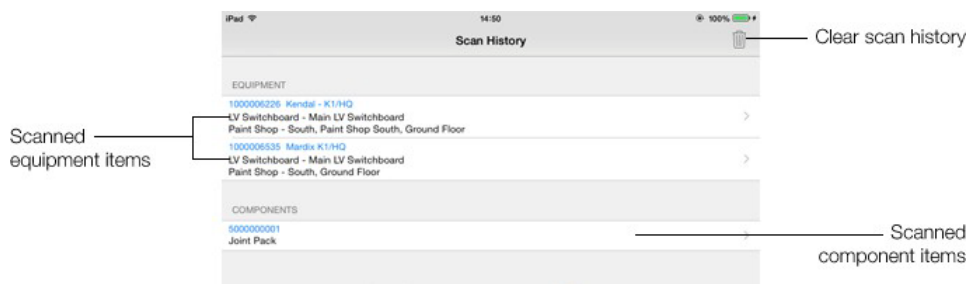


1.6.1 Scan History

The Scan History screen displays a list of all service tag you have scanned since the last full [sync](#). The list is divided into equipment items, and component items which also have service tags (such as IBAR components).

Selecting an item from the list will take you to the relevant [Equipment Details](#) or [Component Details](#) screen.

The trash can icon at the top right of the screen can be used to clear the scan history.



Note that when a component item is added to the scan history, its parent equipment item is **not** automatically added.

The Scan History is normally cleared following a full download sync; you can however change this behaviour in [Settings](#).

1.7 Search

The Search option allows you to search for equipment, components, branches, site visit reports, works orders and service contracts.

The main Search screen shows the full list of search items available for each category.

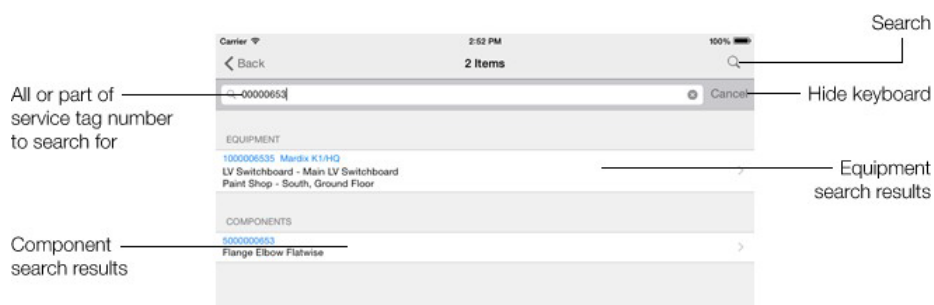


1.7.1 Equipment and Components

To search for either equipment or component items, select **Service Tag Number** from the main Search screen.

Type in all, or some, of the service tag number you want to search for then tap the **search icon**. A list of results matching your search text will appear, separated into equipment and component items. Selecting an item from the list will take you to the relevant [Equipment Details](#) or [Component Details](#) screen.

The **Cancel** button can be used to dismiss the keyboard and see the list of results more easily.

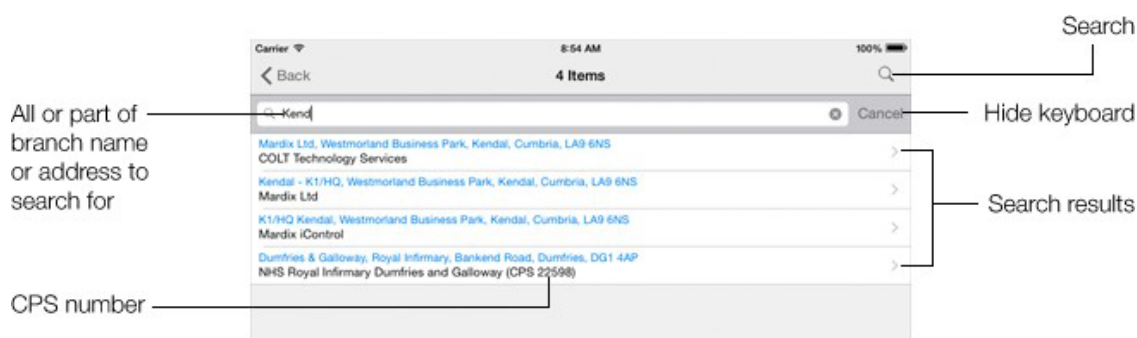


1.7.2 Branches

To search for branches, select **Branch** from the main Search screen.

Type in all, or some, of the company name or branch name or address you want to search for then tap the **search icon**. A list of results matching your search text will appear. Selecting an item from the list will take you to the relevant [Branch Details](#) screen.

The **Cancel** button can be used to dismiss the keyboard and see the list of results more easily.



1.7.3 Site Visit Reports

To search for site visit reports, select **Site Visit Report** from the main Search screen.

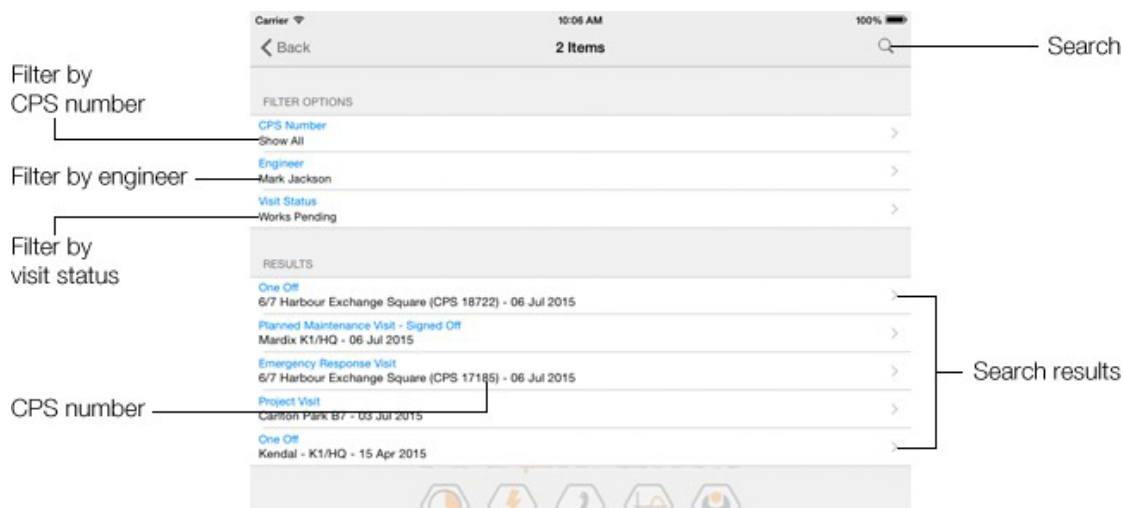
You can search for site visit reports based on their CPS number, engineer and/or visit status.



The filter selection screens preset you with a list of options. These screens also contain a **Clear** button allowing you to clear that particular filter. Note that the engineer selection screen will initially scroll down to your own name in the list.



Once you have made your selection, tap the **search icon**. A list of results matching your search criteria will appear. Selecting an item from the list will take you to the relevant [Site Visit Report](#) screen.



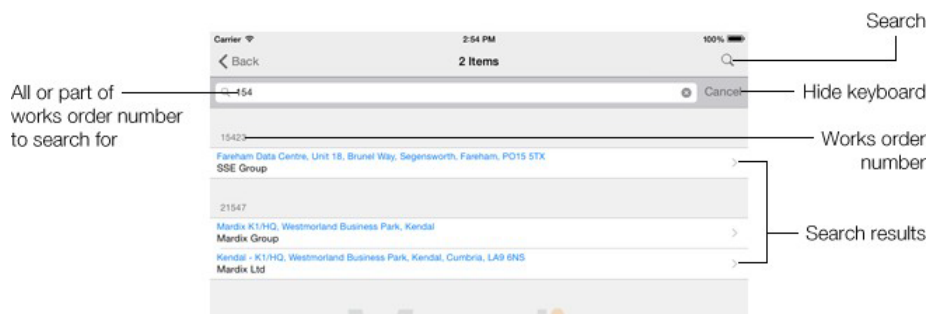
If you do not select a filter before searching, the search results may take some time to load

1.7.4 Works Orders

To search for works orders, select **Works Order** from the main Search screen.

Type in all, or some, of the works order number you want to search for then tap the **search icon**. A list of results matching your search text will appear, consisting of branches grouped by works order. Selecting an item from the list will take you to the relevant [Branch Details](#) screen, with its data filtered to match the relevant works order.

The **Cancel** button can be used to dismiss the keyboard and see the list of results more easily.

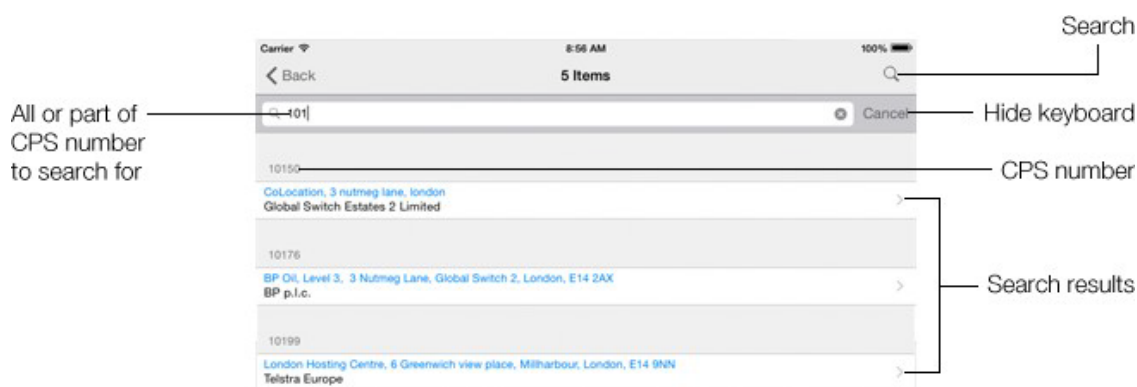


1.7.5 Service Contracts

To search for service contracts, select **Service Contract** from the main Search screen.

Type in all, or some, of the CPS number you want to search for then tap the **search icon**. A list of results matching your search text will appear, consisting of branches grouped by CPS number. Selecting an item from the list will take you to the relevant [Branch Details](#) screen.

The **Cancel** button can be used to dismiss the keyboard and see the list of results more easily.

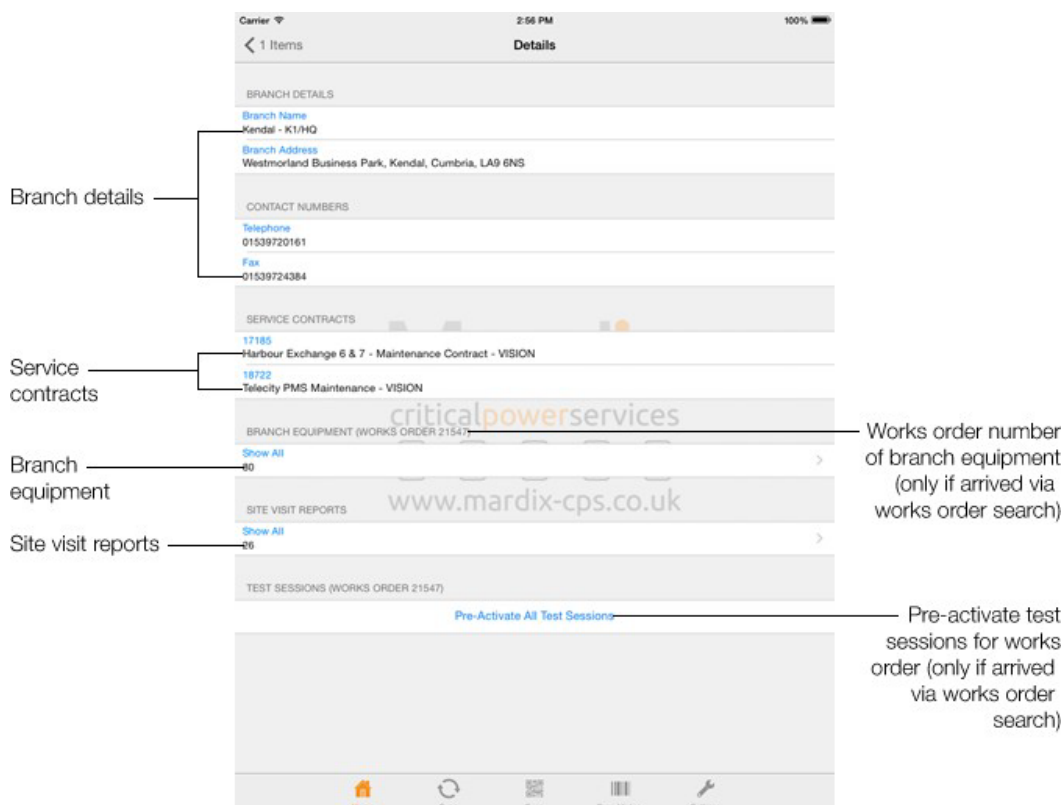


1.8 Branch Details

The Branch Details screen displays information about a branch (such as address and contact details), as well as all equipment and site visit reports relating to the branch.

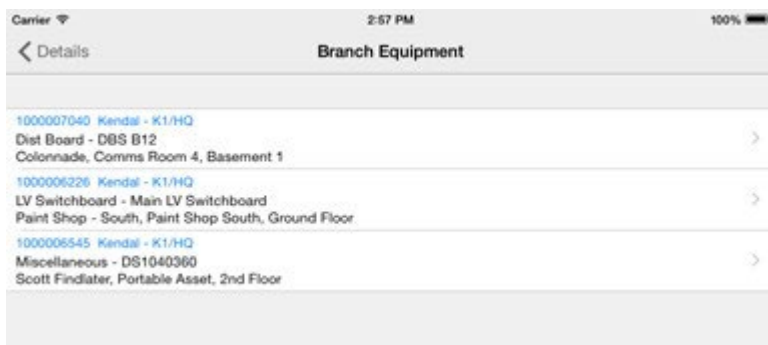
If the screen is reached by using the [branch search](#), then all equipment at the branch will be listed.

If however the screen is reached by using the [works order search](#), then only equipment at the branch covered by the selected works order will be listed (the works order number is displayed in this instance). Also, if the test documents option has been activated on the [Settings](#) screen, test sessions for that works order can be [pre-activated](#) on this screen.



1.8.1 Branch Equipment

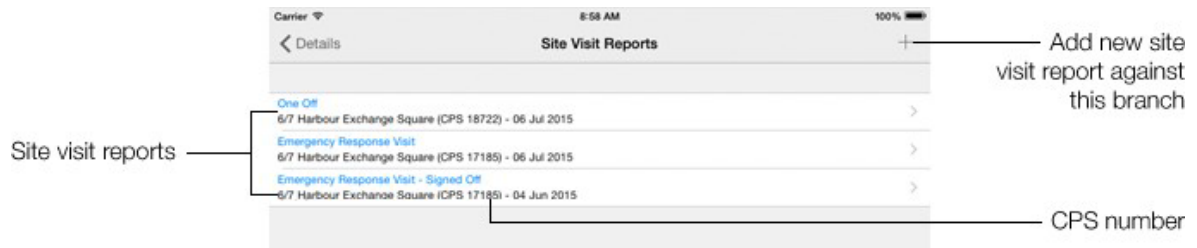
Tapping on **Branch Equipment** will bring up a detailed list of the equipment located at the branch. Selecting an item from the list will take you to the relevant [Equipment Details](#) screen.



1.8.2 Site Visit Reports

Tapping on **Site Visit Reports** will bring up a detailed list of all site visit reports for the branch. Selecting an item from the list will take you to the relevant [Site Visit Report](#) screen.

To [create a new site visit report](#) against the branch, tap on the + icon at the top right of the screen.



1.9 Equipment Details

The Equipment Details screen displays information about a piece of equipment (such as serial number, location and service details), as well as all components, documents, site visit reports and test sessions relating to the piece of equipment.

The Equipment Details screen can be reached using any of the following.

- By [scanning](#) a valid service tag
- By [searching for a service tag number](#)
- By selecting an equipment item from the [scan history](#)
- By selecting an equipment item from the [branch equipment](#) on the Branch Details screen

Some equipment details can be modified using the app, then [synced](#) up to the server.

Cancel changes (new equipment)

Service tag

Serial number

Works order information

Equipment details

Service details

Components

Profile image

Documents

Site visit reports

Test sessions

Save changes (new equipment)

Editable fields

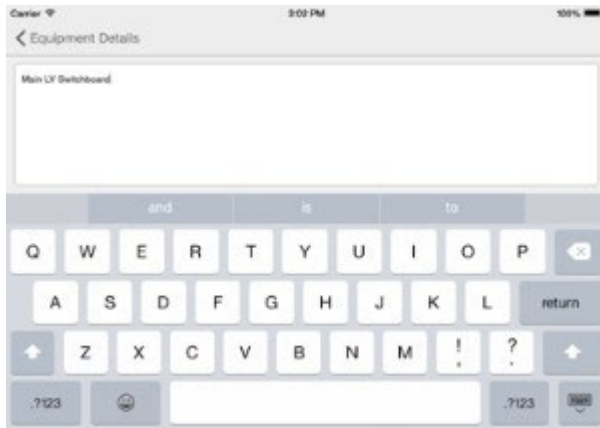
Update profile image

Note that the **Done** and **Cancel** buttons only apply when **tagging new equipment**; if you are editing an existing equipment item your changes are automatically saved as you make them, and the navigation bar is simply used to take you back to the previous screen.

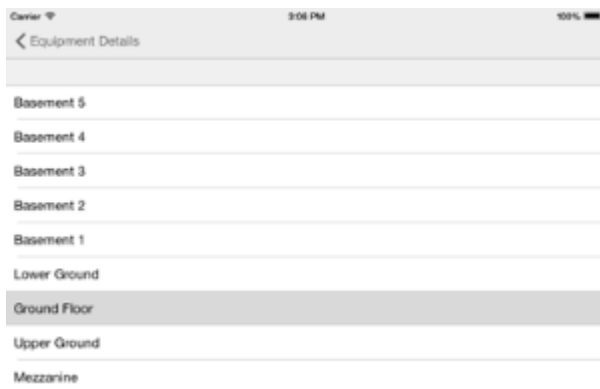
Back to previous screen (existing equipment)

1.9.1 Editing Equipment Items

Text fields such as **Unit Reference** are simply modified by selecting the field then updating the text.

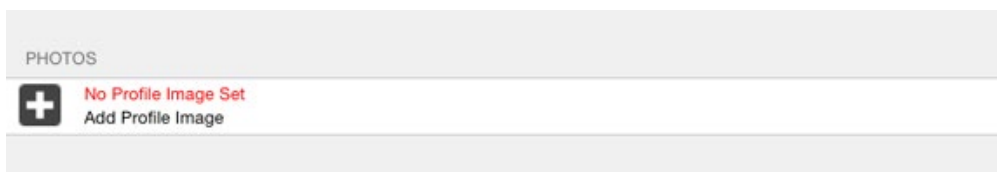


Other field such as **Floor** force you to choose from a list of options. This is to ensure data integrity in the main Vision database.

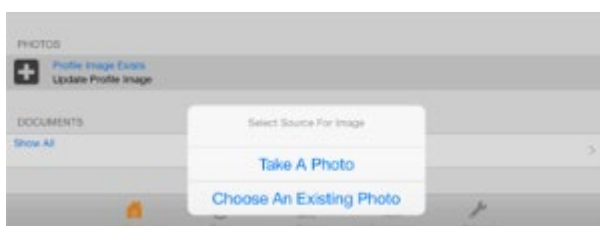


1.9.2 Adding a Profile Image

You can also add, or update, the profile image for the equipment item. If the item currently has no profile image stored on the Anord Mardix Vision server, a red warning will be displayed under **Photos**. However even if it has a profile image, you can still replace this with a new one.



To update the profile image, tap on **Update Profile Image** then select either **Take A Photo** (to use the device's camera to take a new photo) or **Choose An Existing Photo** (to use a photo previously stored on the device's camera roll).



If you select **Take A Photo**, the camera will open within the app and allow you to take a picture. Tap on **Use Photo** to select the photo you have just taken, or **Retake** to take another picture if you are not happy with the one you have taken.



Remember that you must use the **Done** button to commit any changes, including changes to the profile image.

You can delete a profile image that you have added by swiping right-to-left from the end of the screen to reveal a hidden **Delete** button.



1.9.3 Components

Components form part of an equipment item, but often have their own service tags, and can also be modified using the Engineer App.

1.9.4 Equipment Documents

Documents associated with an item of equipment can be downloaded, viewed, and distributed using the Engineer App.

1.9.5 Site Visit Reports

Tapping on Site Visit Reports will bring up a detailed list of all site visit reports for the equipment item. Selecting an item from the list will take you to the relevant [Site Visit Report](#) screen.

To [create a new site visit report](#) against the equipment item, tap on the + icon at the top right of the screen.



1.9.6 Test Sessions

Test certificates can be performed electronically against equipment items using the Engineer App.

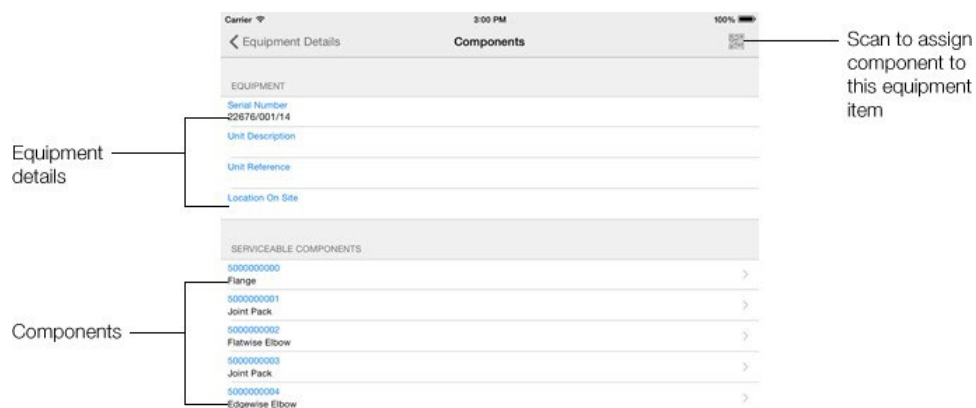
1.9.7 Tagging a New Equipment Item

It is possible to tag a new piece of equipment using the Engineer App. This is done [during a site visit report](#).

1.9.8 Components

Components form part of an equipment item, but often have their own service tags, and can also be modified using the Engineer App.

The main Components screen for an equipment item is accessed by selecting **Components** on the [Equipment Details](#) page. It provides a detailed list of all components for the equipment item. Selecting an item from the list will bring up the Component Details screen.



Assigning Components (Databar Runs)

Tapping the scan icon at the top right of the screen brings up a scan window, allowing you to scan a component's service tag to assign it to the current equipment item. This is most commonly used for Databar installations, where Databar components are scanned to add them to the run (the equipment item).

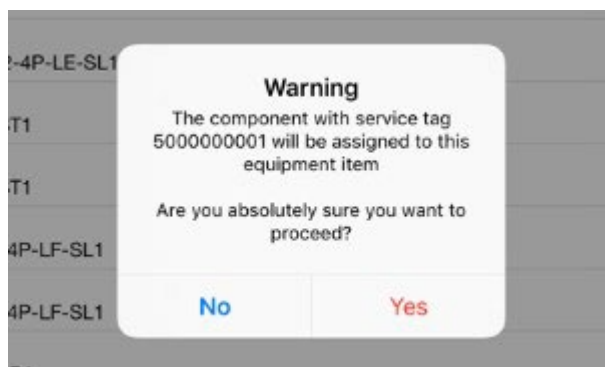
Firstly, scan the equipment (run) service tag to bring up its Equipment Details screen.



Once you have scanned the equipment (run) service tag, tap on **Components** to bring up the Components screen, then tap the scan icon at the top right of the screen. Once the scan window appears, scan the service tag of the component you want to assign to the equipment (run).



You will be asked if you want to move the component. Select **Yes** and the component will now be listed on the Components screen for the current equipment item (run).



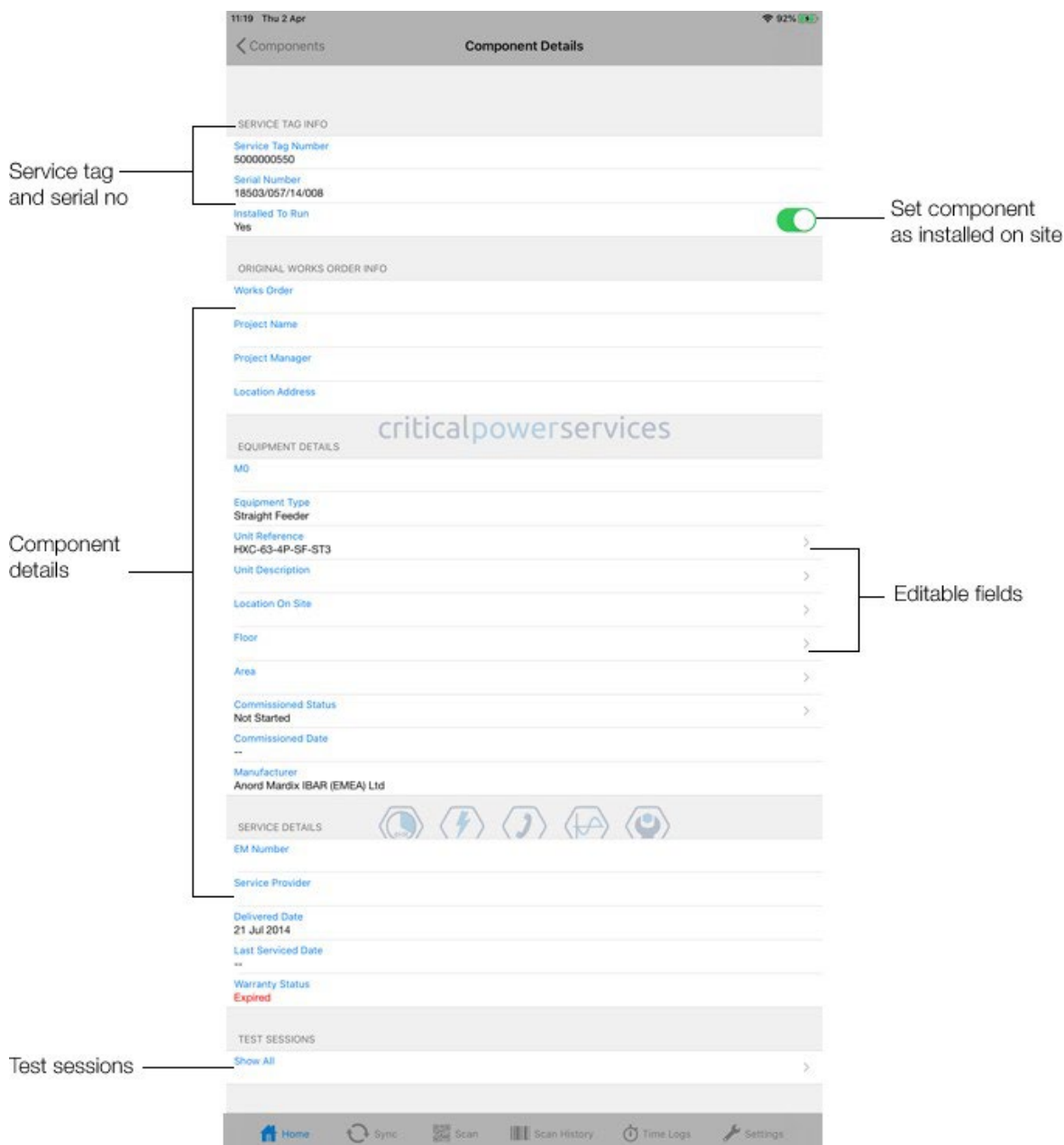
Component Details

The Component Details screen can be reached using any of the following.

- By [scanning](#) a valid service tag
- By [searching for a service tag number](#)
- By selecting a component item from the [scan history](#)
- By selecting a component item from the components list on the [Equipment Details](#) screen



Note that if you arrive at the Component Details via either the [Scan History](#) or [Search](#) screens, navigating back will take you back to the previous screen, but **via** the Components screen and [Equipment Details](#) screen for the parent equipment item.

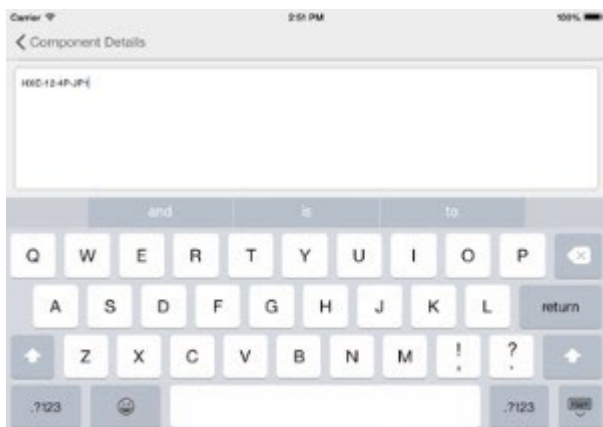


Editing Component Items

Components can be set as installed on site by simply setting the **Installed To Run** switch.



Text fields such as **Unit Reference** are simply modified by selecting the field then updating the text.



Other field such as **Commissioned Status** force you to choose from a list of options. This is to ensure data integrity in the main Vision database.



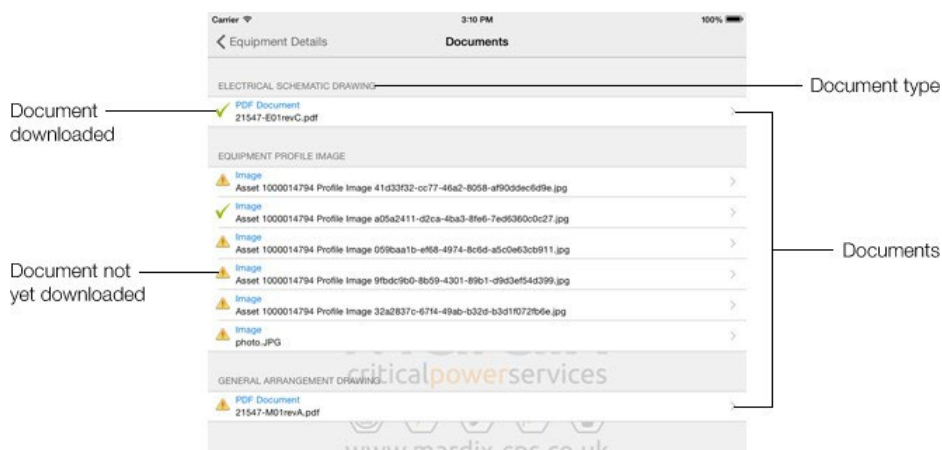
1.9.9 Equipment Documents

Documents associated with an item of equipment can be downloaded, viewed, and distributed using the Engineer App.



The Documents screen displays all documents stored against the equipment item, including general arrangement drawings, electrical schematics and profile images. Tapping on **Documents** on the [Equipment Details](#) screen will bring up the last known list of documents for the equipment item.



At this point the app will attempt to communicate with the server to bring down the latest list of documents. If there is no wi-fi connection available it will display an alert, then show the last information it obtained for the equipment item. Note that you will also need a wi-fi connection to download a document displayed in the list.



The icons displayed next to a document are as follows.

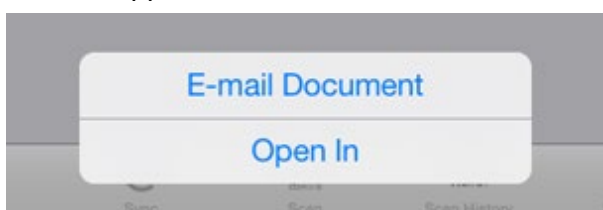
-  Document not yet downloaded
-  Document previously downloaded

To view a document, simply tap on it. If the document has not been previously downloaded (yellow triangle displayed), the app will attempt to contact the server to download it. If it has been downloaded since the last full [sync](#), it will open instantly.

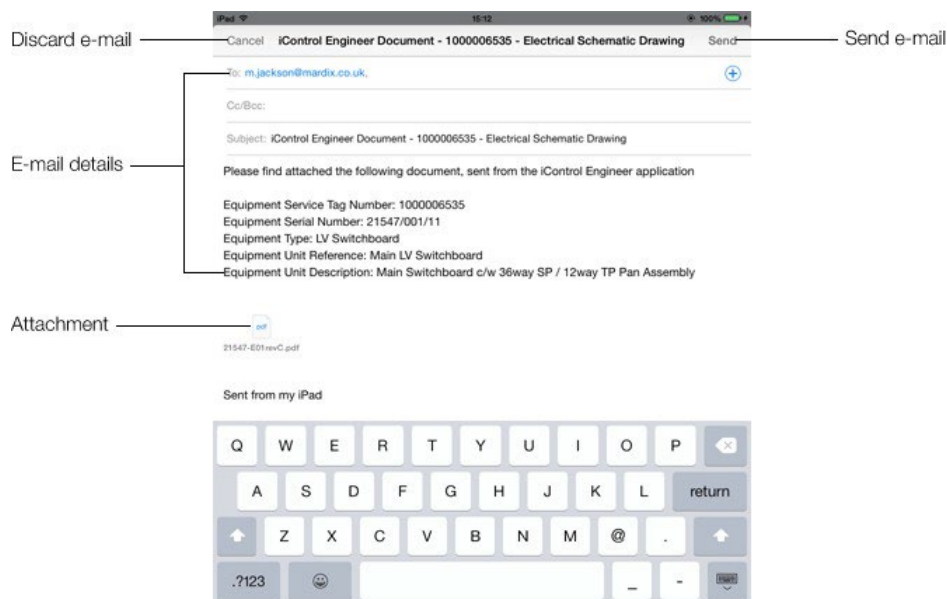
Once a document is displayed, you can zoom in and out of it by pinching or double-tapping the screen.



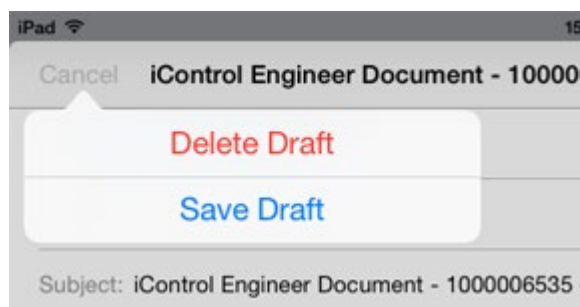
The **Actions** icon at the top right of the screen allows you to email the document, or open it in another application.



Selecting the email option opens an email dialogue with the document as an attachment and its details included in the message body.



If you decide not to send the message, tapping **Cancel** allows you to save it as a draft or simply discard it.



If you have chosen to open the document in another application, you will see a list of apps displayed that are able to open the document. Selecting one of these will then open the document in that app.



1.10 Site Visit Reports

Site visit reports can be logged using the Engineer App, and existing reports either viewed or modified.

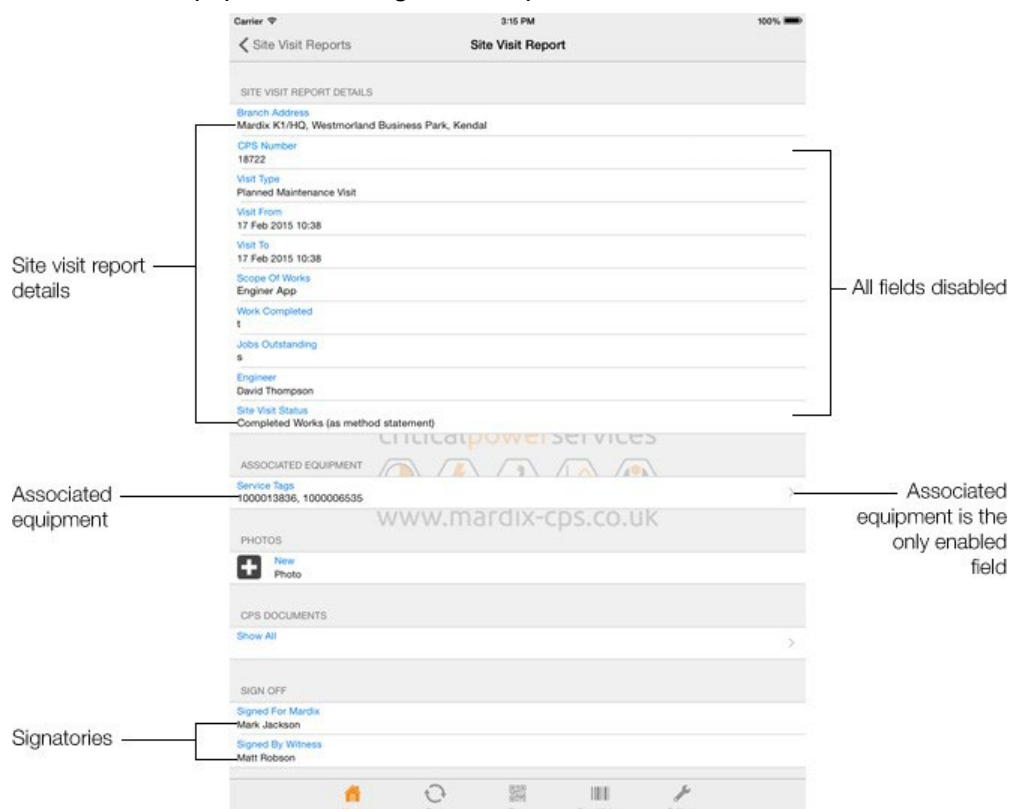
New site visit reports can be created via any of the following.

- By tapping the + icon on the Branch Details [Site Visit Reports screen](#)
- By tapping the + icon on the Equipment Details [Site Visit Reports screen](#)

Existing site visit reports can be accessed using any of the following.

- The Branch Details [Site Visit Reports screen](#)
- The Equipment Details [Site Visit Reports screen](#)
- By [searching for a site visit report](#)

Historic site visit reports that have been signed off are read-only and none of the details can be modified; the only field that can be accessed is **Associated Equipment**, in order to view a detailed list of equipment relating to the report.



1.10.1 Editing a Site Visit Report

New site visit reports, or historic site visit reports that have not yet been signed off, can be fully modified using the Engineer App.

1.10.2 Editing a Site Visit Report

New site visit reports, or historic site visit reports that have not yet been signed off, can be fully modified using the Engineer App.

Site visit reports can either be created on the app, or added onto Vision by Anord Mardix staff then brought down onto the app by running a full [sync](#).

Basic Details

This section describes how to edit the main details of a site visit report, such as dates, works completed, and photos.

Associated Equipment

Site visit reports can have specific equipment items associated with them.

CPS Documents

CPS Documents can be added to a site visit report. Unlike test documents, these do not have to be prepared in advance, and there is no restriction to the number of documents that can be created.

Sign Off

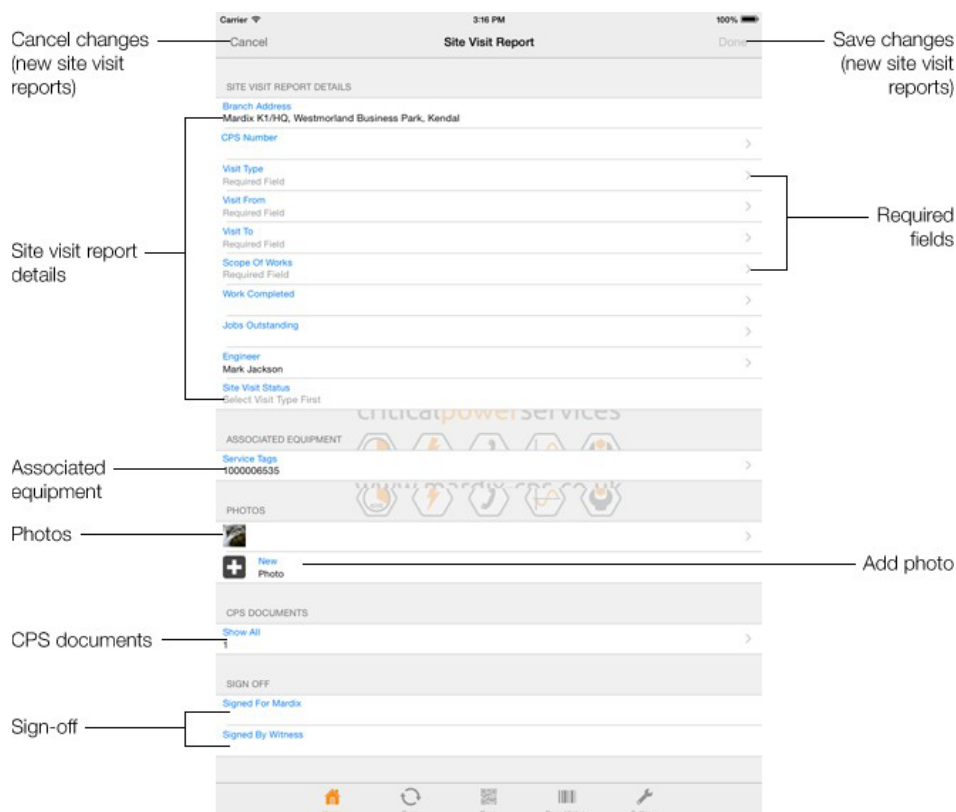
When a site visit report has been completed, it can be signed off by the engineer and a client witness.

Basic Details

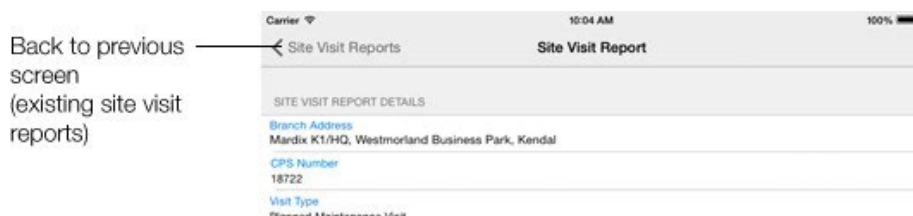
This section describes how to edit the main details of a site visit report, such as dates, works completed, and photos.

All details of a site visit report can be edited using the app, then [synced](#) up to the server. Before a site visit report can be saved however, the following fields must be completed, after which the **Done** button will be enabled allowing a save to take place; all required fields are highlighted on the screen.

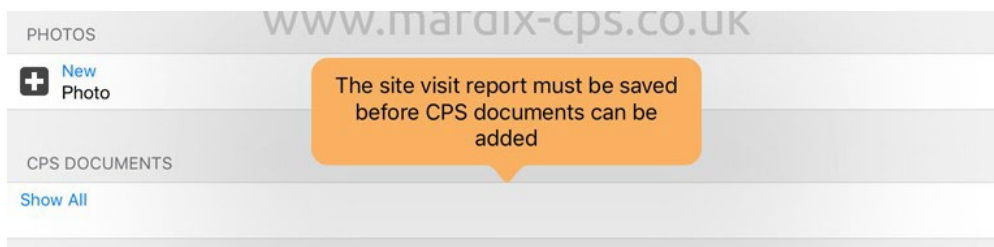
- CPS Number (if applicable)
- Visit Type
- Visit From
- Visit To
- Scope Of Works



Note that the **Done** and **Cancel** buttons only apply when creating a new site visit report; if you are editing an existing site visit report your changes are automatically saved as you make them, and the navigation bar is simply used to take you back to the previous screen.



- i** Some options, such as photos and CPS documents, can only be accessed after the site visit report has been saved. A tooltip will be displayed if an attempt is made to access these options before saving.



Some fields such as **Visit Type** force you to choose from a list of options.

Carrier 3:16 PM 100%

< Site Visit Report

Emergency Response Visit

One Off

Planned Maintenance Visit

Project Visit



Note that the **Visit Type** must be set before the **Site Visit Status** can be selected. Also, subsequently changing the **Visit Type** will reset the **Site Visit Status** to 'Works Pending'.

The **CPS Number** field will only supply valid CPS numbers for the selected branch.

Carrier 9:09 AM 100%

< Site Visit Report

17185 - Harbour Exchange 6 & 7 - Maintenance Contract - VISION

18722 - Telecity PMS Maintenance - VISION

Any date fields are set using a date/time selector. This screen includes a **Clear** button which can be used to clear the selected date.

Carrier 3:17 PM 100%

< Site Visit Report

Clear date selection

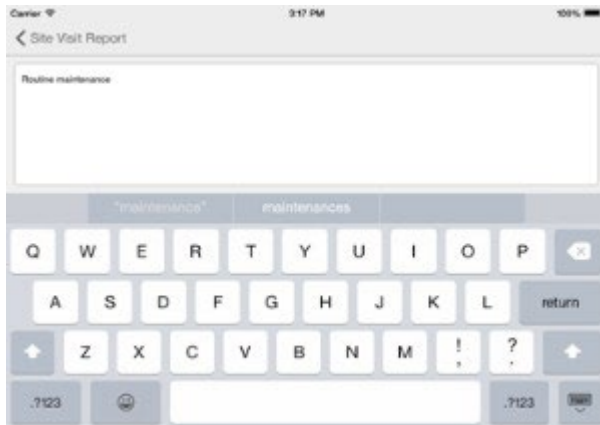
Selected date

Selected Date
60 Mar 2015 15:17

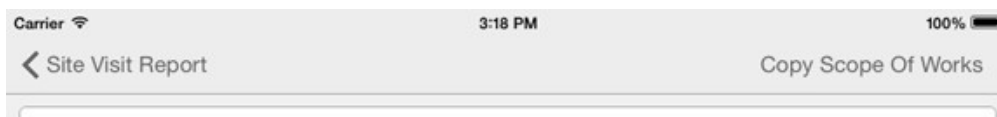
Date/time selector

Start Time (24)	1:00	2:00
Sun Mar 1	1	15
Mon Mar 2	2	16 AM
Today	3	17 PM
Wed Mar 4	4	18
Thu Mar 5	5	19
Fri Mar 6	6	20

Text fields such as **Scope Of Works** are simply modified by selecting the field then updating the text.

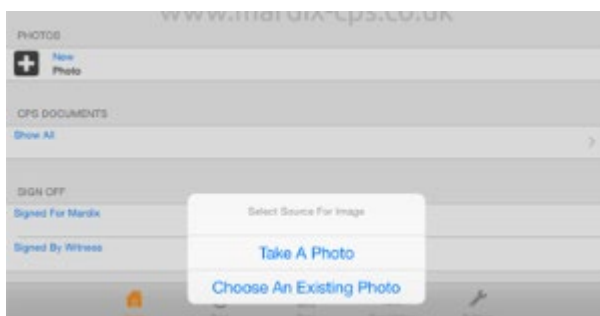


When editing **Work Completed** or **Jobs Outstanding**, you will notice a **Copy Scope Of Works** button at the top right of the screen, which is used to copy the existing text directly from the **Scope Of Works** field to speed up completion of these fields.



Adding Photos

To add a photo, tap on **New Photo** then select either **Take A Photo** (to use the device's camera to take a new photo) or **Choose An Existing Photo** (to use a photo previously stored on the device's camera roll).



If you select **Take A Photo**, the camera will open within the app and allow you to take a picture. Tap on **Use Photo** to select the photo you have just taken, or **Retake** to take another picture if you are not happy with the one you have taken.



You can delete a photo that you have added by swiping right-to-left from the end of the screen to reveal a hidden **Delete** button.



Associated Equipment

Site visit reports can have specific equipment items associated with them.

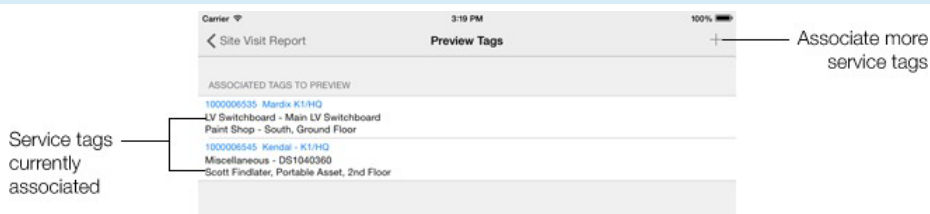
This is particularly important when you need to add [CPS documents](#) to the report, as these can only be created for equipment that has previously been associated.

Previewing Associated Equipment

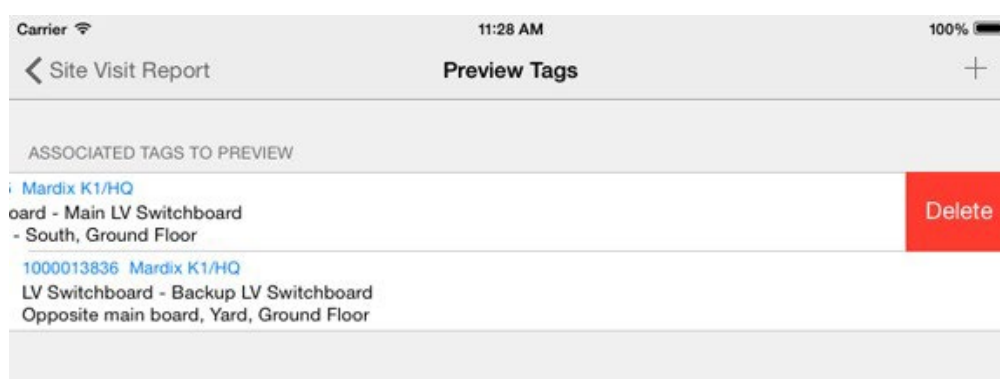
From the Site Visit Report screen, select **Associated Equipment**. This will bring up the Preview Tags screen containing a list of equipment that is currently associated with the site visit report.



If the site visit report was specifically created against a piece of equipment, that equipment item will be automatically added to the list.

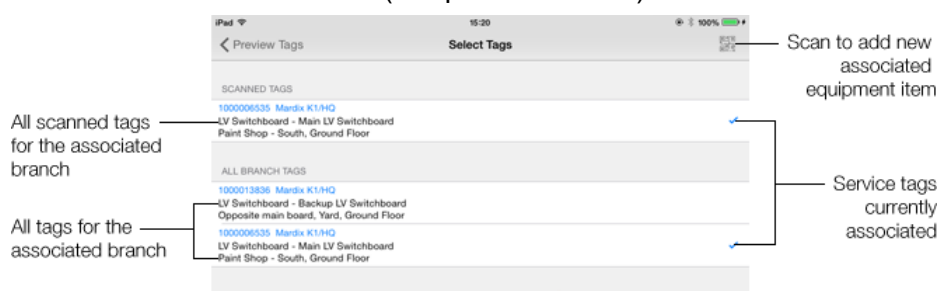


You can remove an associated tag on the Preview Tags screen by swiping right-to-left from the end of the screen to reveal a hidden **Delete** button.



Adding Associated Equipment

From the Preview Tags screen, tapping on the **+** icon at the top right to bring up the Select Tags screen. This screen will list all equipment from the branch, as well as any tags that you have scanned from the branch (for quick reference).



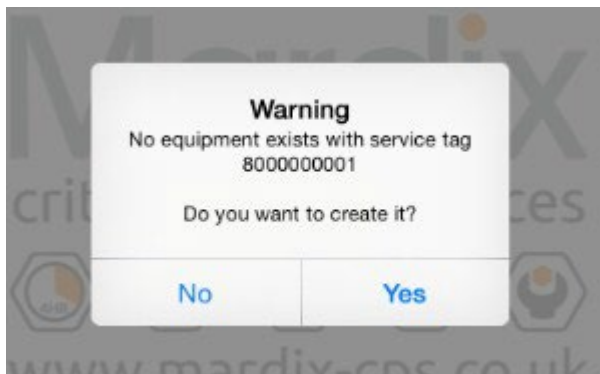
You can add more associated equipment by

- tapping on the **scan icon** at the top right of the screen to bring up a scan window, then scanning the service tag you want to add
- tapping an item in either list (note that tapping an item that is already ticked will remove it from the list of associated equipment items)



Tagging Equipment

If you scan a service tag that does not already exist in the database, you will be prompted to confirm that you want to create the equipment item.



Select **Yes**. The [Equipment Details](#) screen will now be displayed for the new equipment item.

This is similar to the normal Equipment Details screen, except you will be able to modify additional fields, some of which must be completed before the **Done** button is enabled.

- Serial Number
- Equipment Type
- Commissioned Status

- Manufacturer

Selecting **Done** will create the equipment item and add it to the list of branch equipment.

Selecting **Cancel** will discard the changes and the equipment item will not be created.

Cancel changes — Cancel — Done — Save changes

Service tag — Service Tag Number 4000000001

Serial Number Required Field

ORIGINAL WORKS ORDER INFO

Works Order 22241

Project Name

Project Manager

Location Address

EQUIPMENT DETAILS

MD

Equipment Type Required Field

Unit Reference

Unit Description

Location On Site

Floor

Area

Commissioned Status Required Field

Manufacturer Required Field

SERVICE DETAILS

EM Number

Required fields

Editable fields

Note that in order to create equipment, you must firstly select a CPS number on the [Site Visit Report Details](#) screen.

SITE VISIT REPORT DETAILS

Branch Address

Mardix K1/HQ, Westmorland Business Park, Kendal

CPS Number

18722

Visit Type

Planned Maintenance Visit

If not, you will receive an alert like the one shown below.



CPS Documents




CPS Documents can be added to a site visit report. Unlike [test documents](#), these do not have to be prepared in advance, and there is no restriction to the number of documents that can be created.

Tapping on CPS Documents for a [Site Visit Report](#) will bring up the last known list of CPS documents for the site visit report. The list is grouped by document type, and each document shows when it was created, by who, and if it has an associated equipment item.

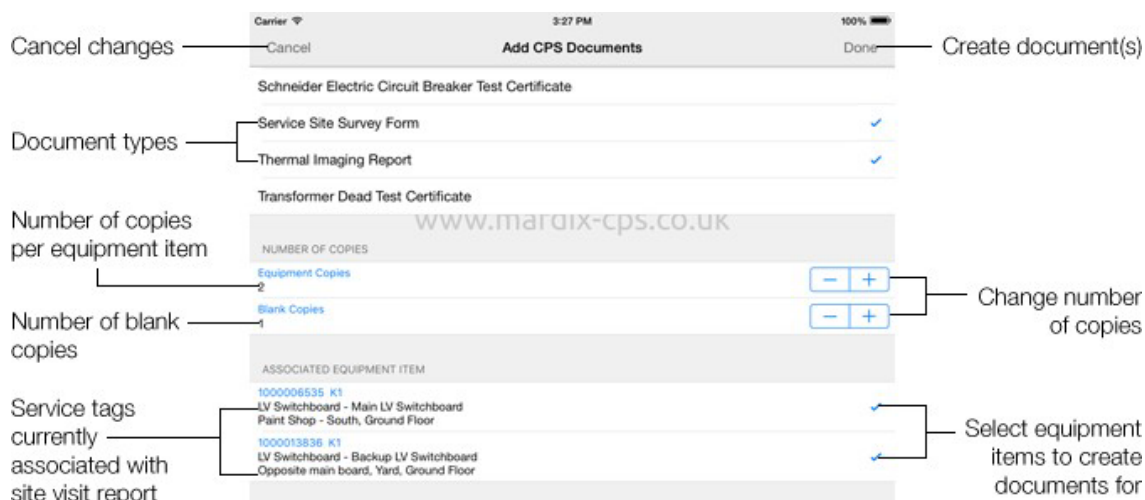
i At this point the app will attempt to communicate with the server to bring down the latest list of documents. If there is no wi-fi connection available it will display an alert, then show the last information it obtained for the equipment item. Note that you will also need a wi-fi connection to download a document displayed in the list.



The icons displayed next to a document are as follows.

-  Document not yet downloaded
-  Document previously downloaded or just created
-  Document modified

New documents can be added by tapping on the + icon at the top right of the screen. This will bring up the Add CPS Documents screen.



From here you can choose

- the type of document(s) to add
- the number of copies to create for each selected piece of equipment
- the number of blank copies to create (only visible for sites with no active service contract)
- which associated equipment items to create documents for (if equipment copies have been selected)



Note that to create a CPS document for a specific piece of equipment, it must have been added to the site visit report as an [associated equipment item](#). If the site has a valid service contract, a CPS document must always be associated with an item of equipment.

To view a document in the documents list, simply tap on it. If the document has not been previously downloaded (yellow triangle displayed), the app will attempt to contact the server to download it. If it has been downloaded since the last full [sync](#), or if you have just created it, it will open instantly.

Carrier 3:27 PM 100%

CPS Documents

Mardix
ELECTRICITY SERVICES

Panel Service Report Sheet

Date of Works: 03 Mar 2015 EM Number: 18776
 Panel Location: Pant Shop - South Panel Ref: Main LV Switchboard
 Serial Number: 2154700111 Service Tag Number: 1000006035
 Engineers: Mark Jackson
 Phase Colours: ☒ L1: Red ☒ L2: Yellow ☒ L3: Blue ☒ N: Black ☐ L1: Brown ☐ L2: Black ☐ L3: Grey ☐ N: Blue

Auto-populated fields

Checkbox

Text field

Textbox used to edit text field

Finished editing text field

If you are the engineer who created the document, you can modify it.

- Check boxes and radio buttons can be modified simply by tapping on them
- Tapping on a text field will bring up a floating grey text box in which you can add or modify the text, then tap on **Done** to confirm the change

Navigating back to the previous screen will save the document.



The fields at the top of each document (e.g. Serial Number, Location etc) are automatically pre-populated from Vision to begin with; however it is important to note that this information is for suggestion only, and **may not necessarily be accurate**; it is important to check these fields and update them if any of the details are incorrect, particularly if specific wording (such as Location) is required to match a method statement.

Note that when editing a text field at the bottom of a document, you can scroll the document up to see the text field you are editing.

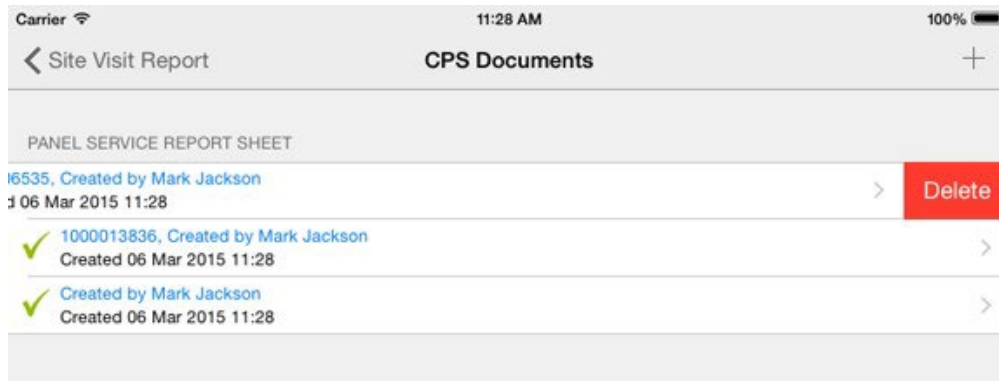
Transformer Connections ☐ YES ☐ NO ☐ NA Panel Cleaned ☐ YES ☐ NO ☐ NA

Post Work Checks
 All switches & MCB disconnections correctly positioned as per start of works ☐ YES ☐ NO ☐ NA
 All shrouds/covers replaced and all doors closed & locked ☐ YES ☐ NO ☐ NA
 Witnessed by Engineer: ☐ YES ☐ NA Witnessed by Client: ☐ YES ☐ NA

Issues Noted & Comments: Enter text

Scrollbar

You can delete a CPS Document that you have added by swiping right-to-left from the end of the screen to reveal a hidden **Delete** button.



i Only edited documents are [synced up to the server](#), so any that you generate but do not edit will not be synced.

Sign Off

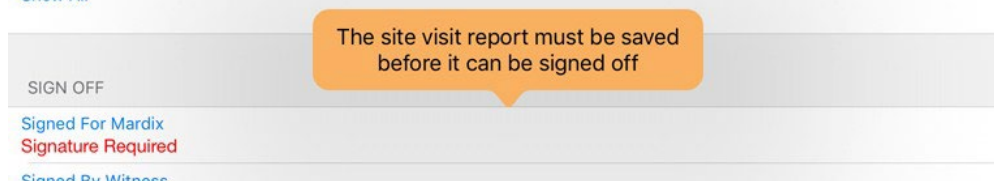
When a site visit report has been completed, it can be signed off by the engineer and a client witness.

A site visit report can be signed off when all required fields have been completed, along with

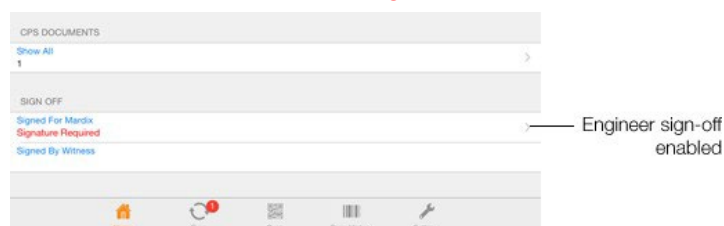
- Work Completed
- Jobs Outstanding
- Site Visit Status (must be set to something other than 'Works Pending')

Note that the site visit report can only be signed off after it has been saved. A tooltip will be displayed if an attempt is made to sign off a site visit report before saving.

[Show All](#)



When all required information is complete and the site visit report has been saved, the **Signed For Anord Mardix** field will be enabled, and **Signature Required** will be displayed in red text.



Tapping on this will bring up a list of engineers; select the name of the engineer who is signing off the site visit report.



You will then be taken to the sign-off screen. Verify all details are correct, then simply draw your signature on the grey pad.

If you need to redraw the signature at any point, long press on the grey pad to clear it.



Tapping **Confirm** will submit the signature and take you back to the Site Visit Report screen, with the signing engineer's name now displayed under **Signed For Anord Mardix**.

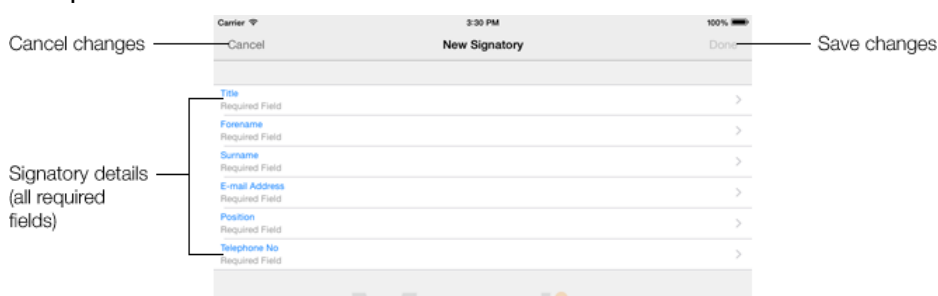


Once the engineer has signed off the site visit report, the **Signed By Witness** field is enabled allowing a client witness to also sign it off, again with **Signature Required** displayed in red text. A list of known client personnel at that branch will be displayed; selecting one will bring up the same sign-off screen as detailed above.

This step is necessary in order for the site visit to be marked as complete.



If the client witness is not listed, you can easily add them by tapping the + icon at the top right of the screen. This will bring up a simple form allowing you to quickly fill in their details. Once submitted, the witness will be [synced](#) up to the server and will then be available to select for all subsequent site visits.



Only when both signatures have been added is the site visit marked as complete, after which no further changes can be made.



Remember that you must use the **Done** button to commit any signatures.

1.11 Test Documents

The Engineer App can be used to complete and sign off electronic test certificates, for both factory and on-site testing.

1.11.1 Background

Anord Mardix testers previously used paper-based test documents, which were usually supplied in packs consisting of specific collections of documents relevant to the type of tests being performed. In addition, each document was of a bespoke design for the works order and M0 of the piece of equipment being tested. This involved a lot of manual input and time to prepare a pack for each individual test session.

The Engineer App provides a flexible, efficient and paper-free version of this process, removing some of the more repetitive aspects of the preparation phase, and providing a database history of all test sessions performed. Test sessions can be signed off on the iPad by the tester and a witness, upon completion of which a final PDF document is produced, comprising the master QMF120 document (complete with both signatures) and all test documents. This document is then automatically e-mailed to both the tester and the test team's shared mailbox, with a separate copy saved to the Anord Mardix network.

The application allows pre-arranged test sessions to be accessed and completed, or ad-hoc test sessions to be created directly from the application itself.

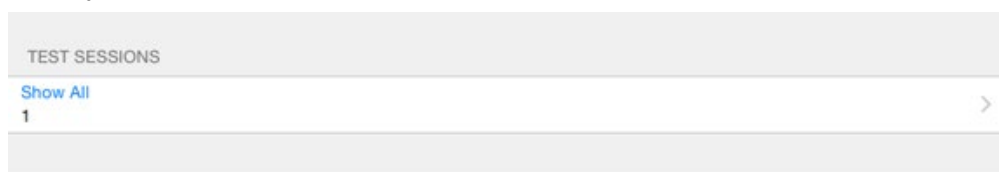
1.11.2 Enabling Test Documents in the App

The Test Documents functionality firstly needs to be [enabled using the Settings screen](#).



1.11.3 Test Sessions Screen

Once the test documents functionality is enabled, you should see a **Test Sessions** field displayed on each [Equipment Details](#) screen.



Tapping on this will bring up a list of any test sessions for the equipment item.



At this point the app will attempt to communicate with the server to bring down the latest list of test sessions. If there is no wi-fi connection available it will display an alert, then show the last information it obtained for the equipment item.

Each test session will display

- its status (such as 'Not Started' or 'In Progress')
- the type of test session (such as 'Site Live Test' or 'Factory Test')
- the start date of the test session (if this has been set)



Selecting a test session will bring up its [electronic test certificate screen](#). You can also [create a new test session](#) by tapping on the + icon at the top right of the screen.

1.11.4 Creating a New Test Session

Test sessions can be created in two ways; either by Anord Mardix testing or service personnel entering them into the Vision system, in which case they will be downloaded onto the app by running a full [sync](#); or they can be created directly from the app itself.

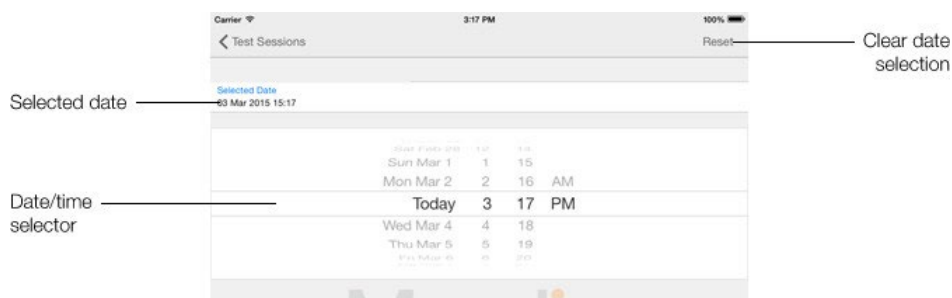
To create a test session from the app, tap on the + icon at the top right of the [Test Sessions screen](#) for the piece of equipment you are testing. This will bring up the New Test Session screen.

From here you can select

- the test type
- the start/end dates of the test session (optional)
- the tester (optional)



The **Test Type** and **Tester** fields simply bring up a list for you to select from. For the dates, a date selector is displayed; this screen includes a **Reset** button which can be used to clear the selected date.

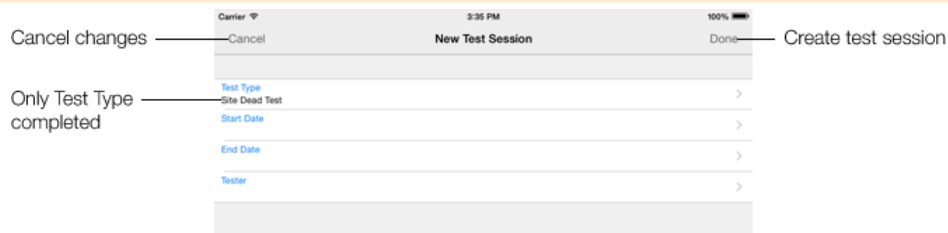


Tap **Done** to commit your changes and create the test session. Note you will need a wi-fi connection at this point as the app needs to contact the server to request the correct documents.



The only field that is actually required is **Test Type**, and in general if you are unsure of who the tester is going to be then it is best to leave this blank, as if a tester has been set then only that tester can activate and complete the test session.

If in doubt, complete the **Test Type** field **only**.



Selecting the correct **Test Type** is very important, as this determines exactly which tests and test documents will comprise the test session. In addition, all test documents are prepared in advance for each piece of equipment and uploaded to Vision by the testing team, so it is important that the test is planned.

If in any doubt, contact the Mardix testing department.

1.11.5 Test Certificate

The **Test Certificate** screen is the entry point for a test session, and is effectively an electronic version of the QMF120 form.

From this screen, you can view information about the equipment item being tested; details of the test session; and results of the individual tests. If the test session is active on the current device, you can also modify and complete the individual test documents associated with the tests.

Test certificates are accessed from the [Test Sessions screen](#) for the piece of equipment you are testing.

Activation

When you access a test certificate for the first time, you will need to activate it before you can complete it.

Completing a Test Certificate

After activating a test session, its Test Certificate screen will display links to the individual tests which can now be completed using the app.

Pre-Activation

Normally, activating a test session requires a wi-fi connection, as the process involves the device contacting the live Anord Mardix server to download the test documents. However, in certain situations this may not be practical (for example if you are scheduled to test some pieces of equipment on a secure site with no wi-fi connection).

Activation

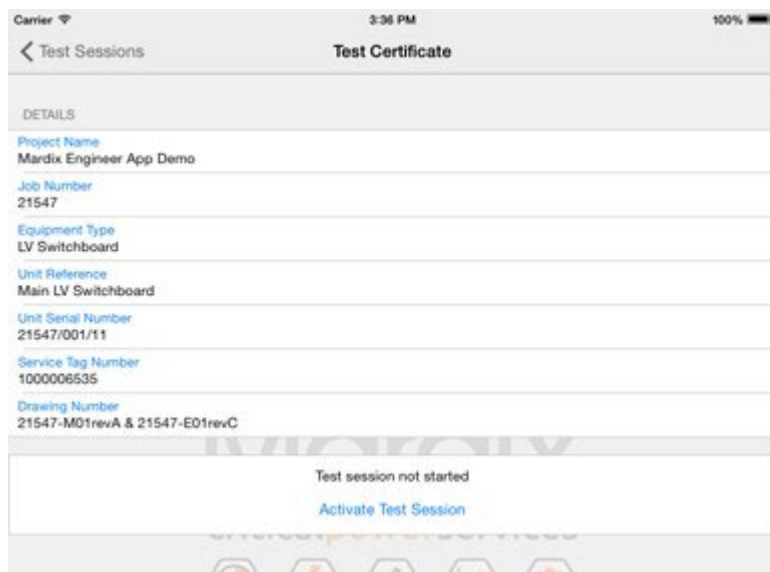
When you access a test certificate for the first time, you will need to activate it before you can complete it.

Activation is the process whereby the app requests the actual test documents from the server and brings them down onto the app. Again, for this to work you will need to be in range of a wi-fi connection.

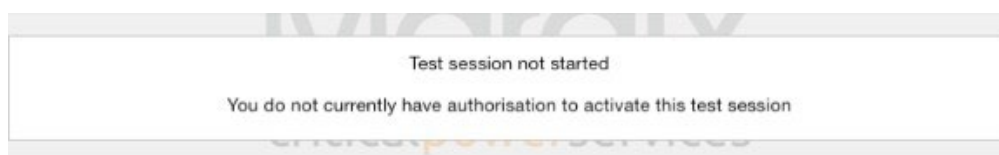


If you anticipate needing to perform this step outside of wi-fi range, then you will probably need to [pre-activate the test session](#).

At first, all you will see on the Test Certificate screen is basic details of the equipment being tested, and an **Activate Test Session** button.



If however the test session has been created for a named tester other than yourself, then a message will be displayed informing you that you do not have authorisation to activate the test session.



To activate the test session, tap on the **Activate Test Session** button. You should see a progress icon appear briefly while the app contacts the server, then the [full details of the test certificate will be displayed](#).



Once a test session has been activated, it is then locked down to the activating user and cannot then be accessed by anyone else.

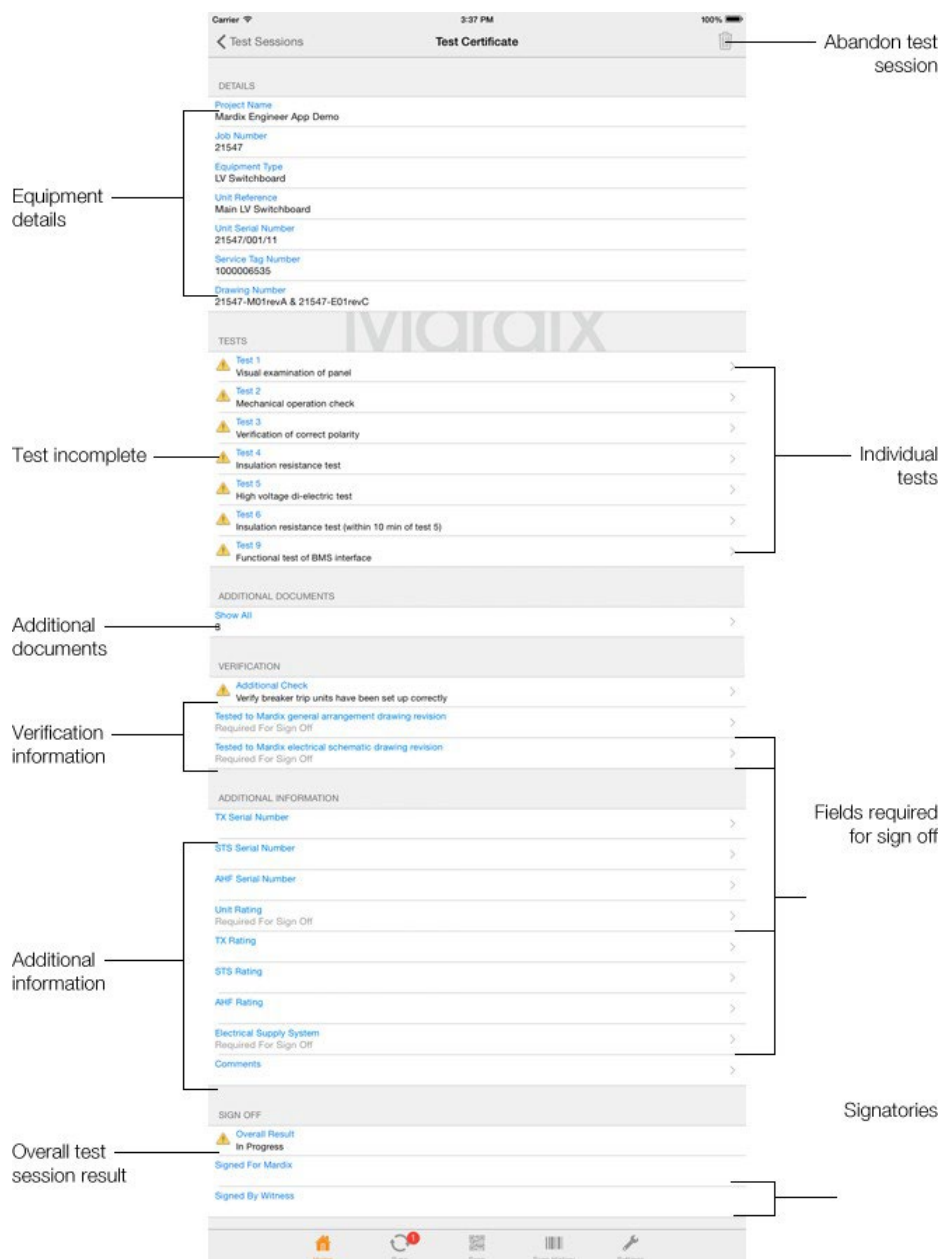
For **IBAR Tests** and **IBAR Tap Off Box Tests** only, upon tapping **Activate Test Session** you will be required to scan a location tag, which should be present at all testing stations. Once you have scanned a valid location tag, activation will proceed as normal.



Completing a Test Certificate

After activating a test session, its Test Certificate screen will display links to the individual tests which can now be completed using the app.

Note the process for completing IBAR Installation Test Certificates specifically is [further detailed here](#).



Test Documents

To begin with, all tests appear with yellow warning triangle icons to indicate they have not yet been completed. To bring up a test document, tap on its corresponding test on the screen. You should now see the test document displayed on the screen, with the document type (e.g. **STF01**) and the equipment details displayed at the top.

You can edit any of the fields on the test document by tapping on them

- Check boxes and radio buttons can be modified simply by tapping on them
- Tapping on a text field will bring up a floating grey text box in which you can add or modify the text, then tap on **Done** to confirm the change



The equipment details at the top of each certificate are automatically populated, and cannot be changed,

Tapping the **Test Certificate** link on the top left of the screen will save your changes and take you back to the Test Certificate screen.

Note that when editing a text field at the bottom of a document, you can scroll the document up to see the text field you are editing.

All test documents will contain a pass/fail option, which is usually found at the bottom of the document. Simply tap the relevant option to set the test as either passed or failed.

In some cases, there will be a third option of N/A - select this if the test is not applicable to the test session.

☒ PASS ☐ FAIL

Transfer result to form QMF120

Some test documents require you to complete all Pass/Fail/NA radio buttons before the test can be assigned an overall result.

<input type="radio"/> PASS <input type="radio"/> FAIL <input type="radio"/> N/A	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A
<input type="radio"/> PASS <input type="radio"/> FAIL <input type="radio"/> N/A	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A
<input type="radio"/> PASS <input type="radio"/> FAIL <input type="radio"/> N/A	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A
<input type="radio"/> PASS <input type="radio"/> FAIL <input type="radio"/> N/A	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A

The QMF121 (normally used for tests 4, 5 & 6) differs slightly from the other documents as follows.

- A single document covers all three tests 4, 5 & 6 - selecting any of these tests will bring up the same document
- Each test's pass/fail option is displayed in a separate section
- The value selected in the **Voltage** radio buttons for tests 4 & 6 is very important, as this is recorded on the final composite test document produced upon completion of the test session
- Similarly, the value entered in the **Inst Ref** fields for tests 4, 5 & 6 is also recorded on the final document

Carrier 3:40 PM 100%

< Test Certificate QMF121

EQUIPMENT: Main LV Switchboard
UNIT SERIAL NO: 21547001/11

CHECK / TEST	INST REF	RESULT					
200+ MΩ is the standard pass result in this test.							
Insulation resistance test ● 500v DC ○ 1000v DC	Mac A1	CLEAN E - CASE	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A	CASE - N	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL	N - L2	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL
		CLEAN E - N	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A	CASE - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL	N - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL
		CLEAN E - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A	CASE - L2	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL	L1 - L2	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL
		CLEAN E - L2	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A	CASE - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL	L1 - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL
		CLEAN E - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A	CASE - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL	L2 - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL
		CLEAN E - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A	CASE - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL	L2 - L3	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL
● PASS ○ FAIL ○ N/A							
High voltage dielectric test 1.9kV for 1 Second	Mac 1114	Note both pass or fail & result in this test.					
		CLEAN EARTH - CASE	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A	CLEAN EARTH - NEUTRAL	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A		
		NEUTRAL - CASE	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL	CLEAN EARTH - PHASE	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL <input type="checkbox"/> N/A		
		PHASE - CASE	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL	NEUTRAL - PHASE	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL		
		PHASE - CASE	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL	PHASE - PHASE	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL		
		PHASE - CASE	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL	PHASE - PHASE	<input type="checkbox"/> PASS <input type="checkbox"/> FAIL		
○ PASS ○ FAIL ● N/A							

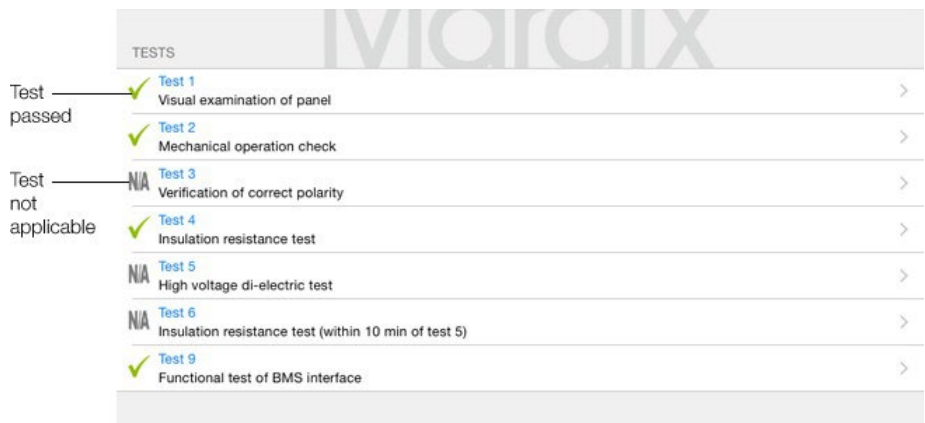
Voltage selector

Instrument reference

Separate results for individual tests

Test results are displayed on the Test Certificate screen as follows.

- test passed
- test failed
- test not applicable



Additional Documents

Additional documents can be added to a test session. Unlike test documents, these do not have to be prepared in advance, and there is no restriction to the number of documents that can be created.

Adding Test Documents

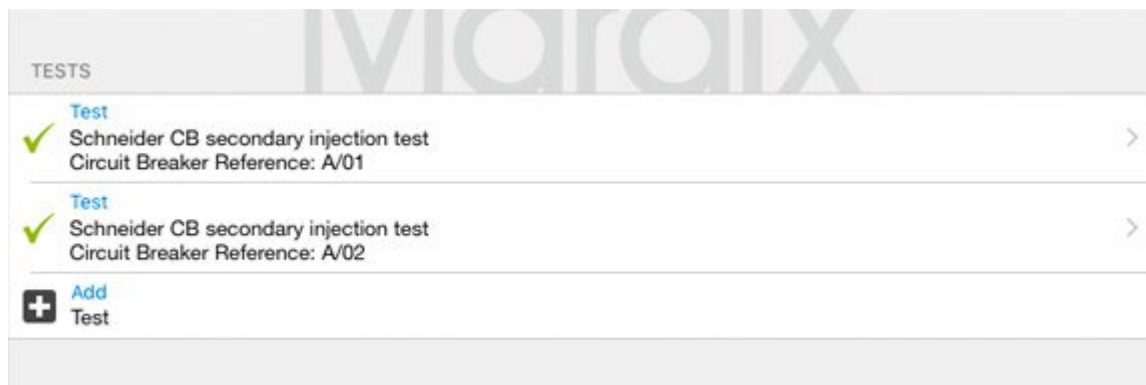
Some test session types allow you to add new tests. These test session types usually only have one associated test type. Tapping on the **Add Test** button will add a new test to the list.



Any tests that you have created, but not yet synced up, can be deleted by swiping right-to-left from the end of the screen to reveal a hidden **Delete** button.

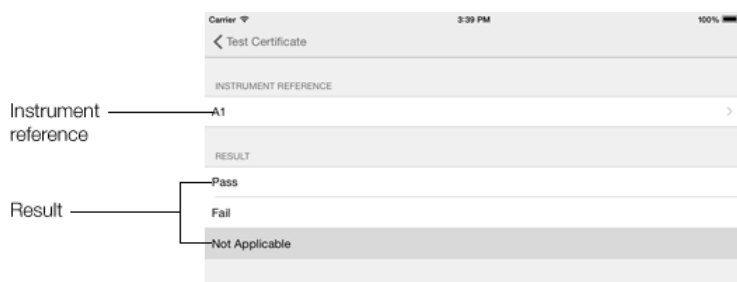


Some test sessions that allow you to create tests display additional information to distinguish between tests; for example, Schneider CB Secondary Injection Tests display the circuit breaker reference from the associated document.



Tests Without Documents

Some tests on a Test Certificate do not have documents associated with them. For these tests, you will firstly need to set the **Instrument Reference**, after which you will then be able to simply select one of the results displayed.



Other Information

There are a number of other fields that can be completed on the test certificate; these either prompt you to enter text via a text editor, or to select values from a list.

In addition to the individual tests themselves, the fields that must be completed before a test certificate can be signed off are:

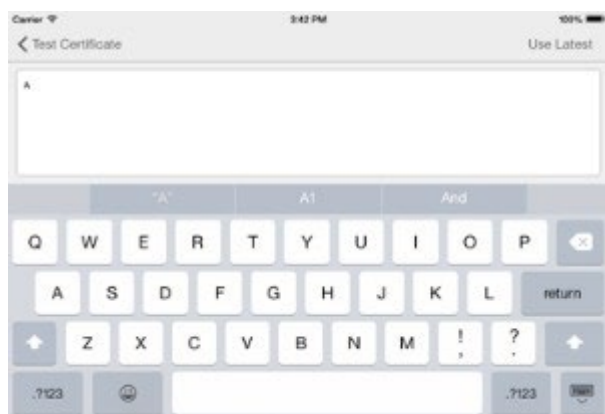
- Verify breaker trip units have been set up correctly
- Tested to Anord Mardix general arrangement drawing
- revision Tested to Anord Mardix electrical schematic
- drawing revision Unit Rating
- Electrical Supply System

Most of these fields display 'Required For Sign Off' until they are completed.

The text entered into the **Comments** field, although not required, will be displayed under that test session on the [Test Sessions screen](#), so can be useful to highlight specific information about a test session (for example, if it only covers part of a panel).



When editing the **Tested to Anord Mardix general arrangement drawing revision** and **Tested to Mardix electrical schematic drawing revision** fields, there is a **Use Latest** button at the top right that will automatically populate the latest relevant drawing revision from the



Vision data.

When all tests are complete and their result fields have been set, the **Overall Result** will be displayed on the Test Certificate screen as

- pass
- fail

Once all required fields have been completed, the test certificate can be [signed off](#).

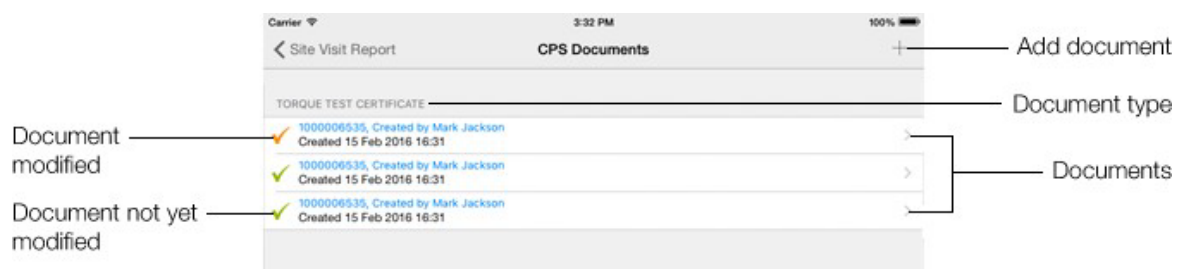
Abandoning a Test Session

Tapping the **Abandon** icon will close off the test session and mark it as 'Abandoned'. This operation requires a wi-fi signal to complete.



Additional Documents

Additional documents can be added to a test session. Unlike [test documents](#), these do not have to be prepared in advance, and there is no restriction to the number of documents that can be created.

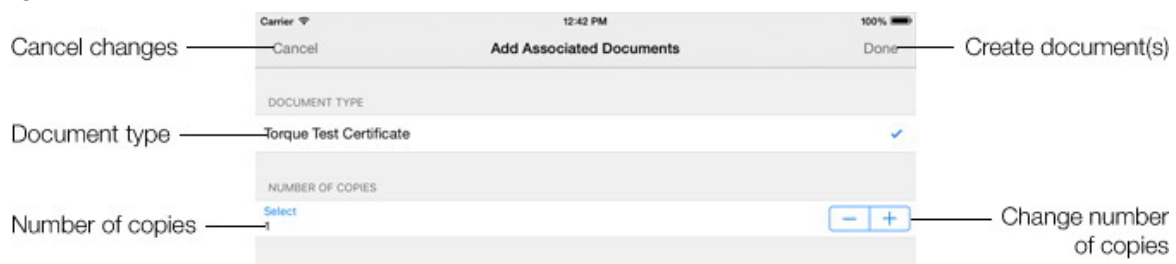
Tapping on Additional Documents for a [Test Certificate](#) will bring up the last known list of additional documents for the test session. The list is grouped by document type, and each document shows when it was created.



The icons displayed next to a document are as follows.

-  Document not yet modified
-  Document modified

New documents can be added by tapping on the + icon at the top right of the screen. This will bring up the Add Associated Documents screen.



From here you can choose

- the type of document(s) to add
- the number of copies to create


To view a document in the documents list, simply tap on it.

The screenshot shows the 'Torque Test Certificate' app interface. At the top, the status bar shows 'Carrier', '1:55 PM', and '100%' battery. Below the status bar, there's a navigation bar with a back arrow, 'Associated Documents', and the title 'Torque Test Certificate'. The main content area is divided into two sections. The top section, titled 'Mardix Torque Test Certificate', contains a form with fields for 'PROJECT' (Mardix Engineer App Demo), 'JOB NO' (21547), 'DATE' (29 Jul 2015), 'EQUIPMENT' (Main Switchboard c/w 30way SP / 12way TP Plan Assembly), 'UNIT REFERENCE' (Main LV Switchboard), 'UNIT SERIAL NO' (21547000/11), and 'DRAWING NO' (21547-A001 & 21547-E01). The bottom section, titled 'CONNECTION DETAILS', is a table with columns for 'TORQUE SETTINGS (Nm)', 'TORQUE WRENCH SERIAL NO.', and 'PASS (✓)'. A 'Comments' text box is positioned below the table. A keyboard is visible at the bottom, with the 'Done' button highlighted. Annotations with lines pointing to specific elements are as follows:

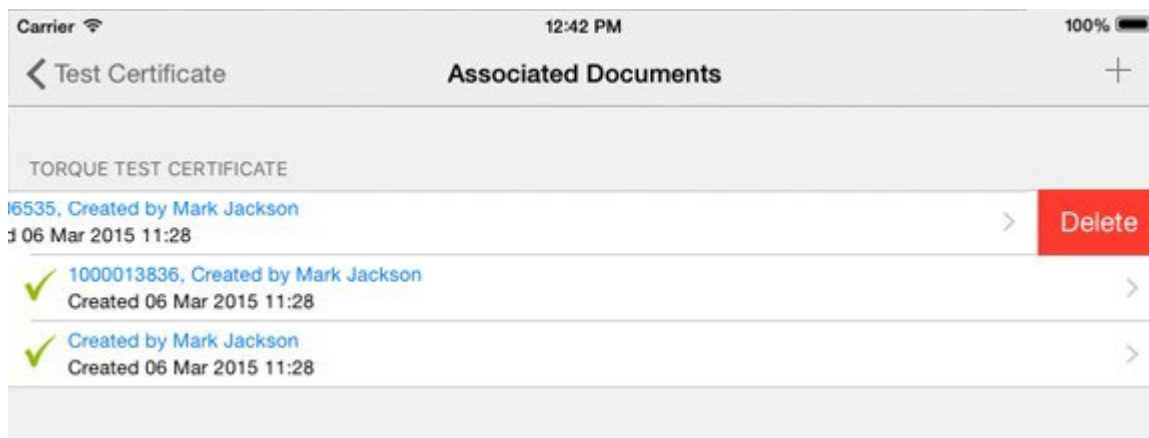
- 'Auto-populated fields' points to the 'PROJECT', 'JOB NO', 'DATE', 'EQUIPMENT', 'UNIT REFERENCE', 'UNIT SERIAL NO', and 'DRAWING NO' fields.
- 'Text field' points to the first row of the 'CONNECTION DETAILS' table.
- 'Textbox used to edit text field' points to the 'Comments' text box.
- 'Checkboxes' points to the 'PASS (✓)' column of the 'CONNECTION DETAILS' table.
- 'Finished editing text field' points to the 'Done' button on the keyboard.

- Check boxes and radio buttons can be modified simply by tapping on them
- Tapping on a text field will bring up a floating grey text box in which you can add or modify the text, then tap on **Done** to confirm the change

Navigating back to the previous screen will save the document.

 The fields at the top of each document (e.g. Serial Number, Location etc) are automatically pre-populated from Vision to begin with; however it is important to note that this information is for suggestion only, and **may not necessarily be accurate**; it is important to check these fields and update them if any of the details are incorrect, particularly if specific wording (such as Location) is required to match a method statement.

You can delete an associated Document that you have added by swiping right-to-left from the end of the screen to reveal a hidden **Delete** button.



Only edited documents are [synced up to the server](#), so any that you generate but do not edit will not be synced.

Sign Off

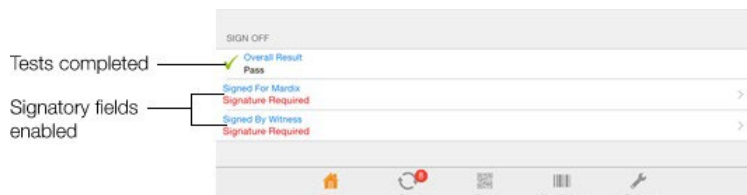
When all tests and required information is complete, a test certificate must be signed off by both the tester and a witness.

Once the test certificate has been signed off, [syncing it up](#) to the live Anord Mardix server will complete the test session, lock it down so that it can no longer be modified, and generate the final read-only composite test document to the test team.



A test session is only set as completed when it has had both signatures added and been synced up to the server; up until that point it could still be modified and no final document will be produced, so it is very important to complete these steps.

When all required information is complete, the **Signed For Anord Mardix** and **Signed By Witness** fields will be enabled.



Tapping on **Signed For Anord Mardix** will bring up a list of engineers; select the name of the tester.



You will then be taken to the sign-off screen. Verify all details are correct, then simply draw your signature on the grey pad.

If you need to redraw the signature at any point, long press on the grey pad to clear it.



Tapping **Confirm** will submit the signature and take you back to the Site Visit Report screen, with the signing engineer's name now displayed under **Signed For Anord Mardix**.



The **Signed By Witness** field can be completed by either a Anord Mardix engineer (if this is a factory test), or a client witness (if this is a witness or site test).

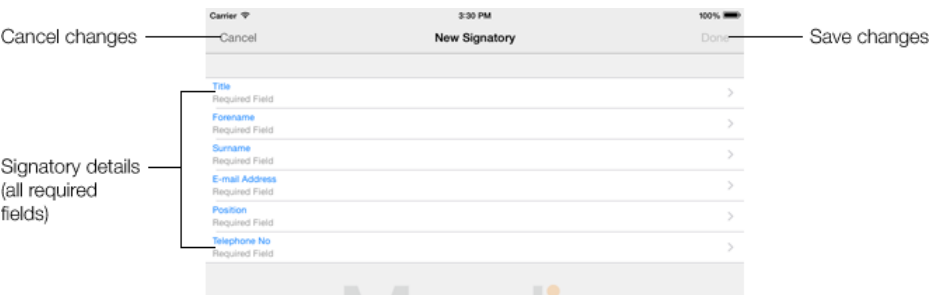
If a Anord Mardix engineer is witnessing, select **Mardix** then follow the exact same process described above. If on the other hand a client is witnessing, select **Client**.



If a client witness is selected, a list of known client personnel at that branch will be displayed; selecting one will bring up the same sign-off screen as detailed above.



If the client witness is not listed, you can easily add them by tapping the + icon at the top right of the screen. This will bring up a simple form allowing you to quickly fill in their details. Once submitted, the witness will be [synced](#) up to the server and will then be available to select for all subsequent site visits.



Only when both signatures have been added is the site visit marked as complete.



i Once both signatures have been completed, when the test session is **synced** up, the final test documents will then be e-mailed to the tester and the Mardix test team. A copy of the documents will also be automatically stored on the network.

Note that completed test sessions are not brought down with a full sync, so after completion then running a download sync, those test sessions will no longer appear on the device.

Pre-Activation

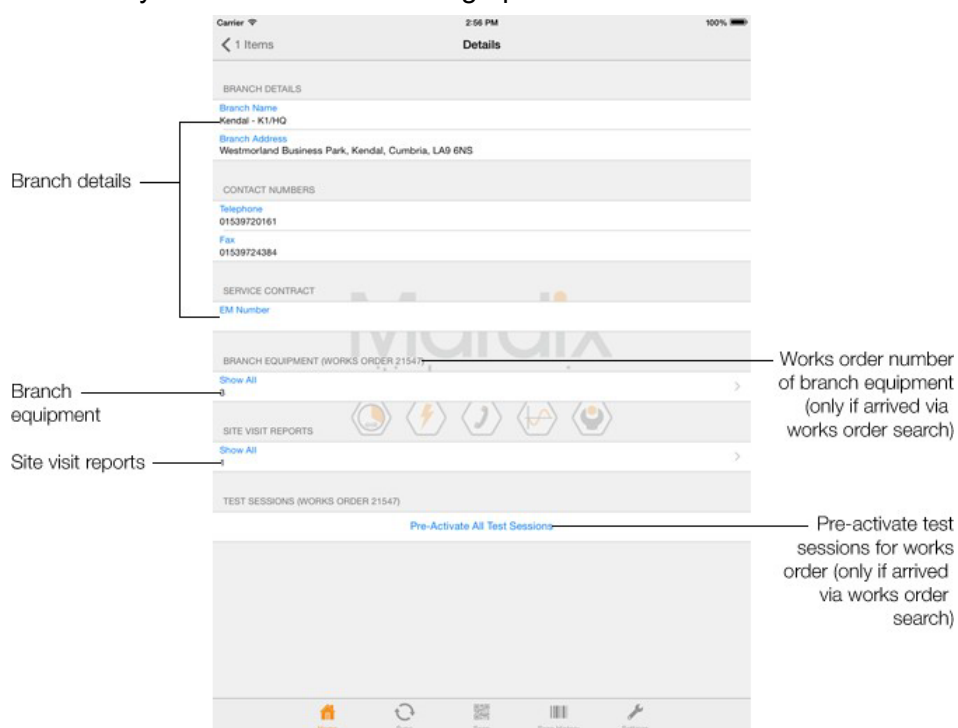
Normally, **activating a test session** requires a wi-fi connection, as the process involves the device contacting the live Anord Mardix server to download the test documents. However, in certain situations this may not be practical (for example if you are scheduled to test some pieces of equipment on a secure site with no wi-fi connection).

The pre-activation functionality provides a way around this problem, by allowing you to download the documents for a batch of pre-prepared test sessions in advance. The only requirements are that you know which works order number the test sessions fall under, and that the test sessions have been created but not yet activated.

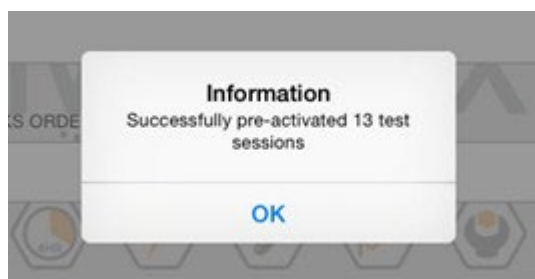
Pre-Activating Test Sessions

i These initial preparation steps below must be performed in wi-fi range; however the actual activation of the test session does **not** then need a connection.

To begin the process, [search for the relevant works order number](#), then select any branch that is covered by that works order to bring up its [Branch Details](#) screen.



Tap **Pre-Activate All Test Sessions**. A progress icon will appear, followed eventually by a message advising that a number of test sessions have been pre-activated. From this point on you no longer need a wi-fi connection.



! As the pre-activation process brings down the test documents for **all** test sessions under a works order that are marked as 'Not Started', it may take a while to complete.

Activating Pre-Activated Test Sessions

Once a test session has been pre-activated, it can be activated instantly without the need for a wi-fi connection.

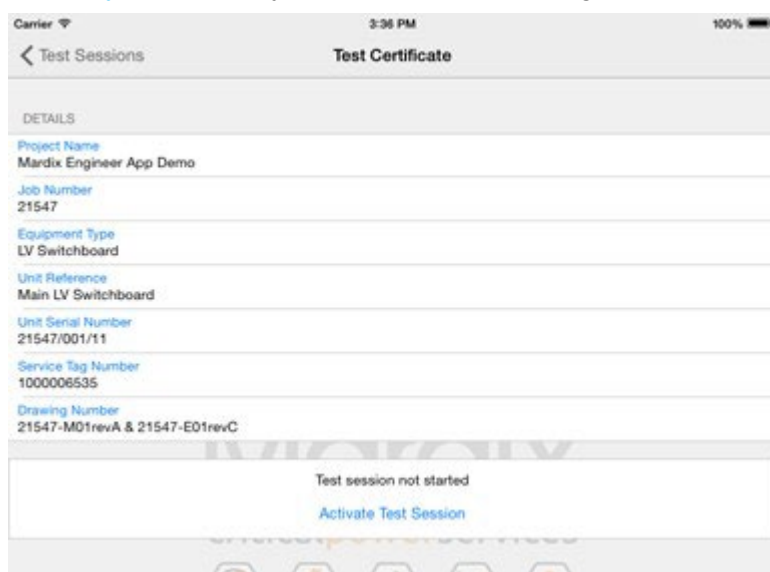
Go to the [Equipment Details](#) screen for the piece of equipment being tested, and tap on **Test Sessions**.

If all went OK with the pre-activation process, the expected test session should be displayed with a status of 'Not Started'.



Select the test session, and the same screen should be displayed [as during normal activation](#).

This time however, tapping **Activate Test Session** will bring up all the test documents instantly without any communication with the server. You can now [complete the test certificate as normal](#), then [sync up](#) once you are back in wi-fi range.



1.11.6 IBAR Installation Tests

Creating, activating and completing an IBAR Installation Test Certificate follows the same processes detailed on the following page, however further specific guidance on completing this type of test certificate can be found below.

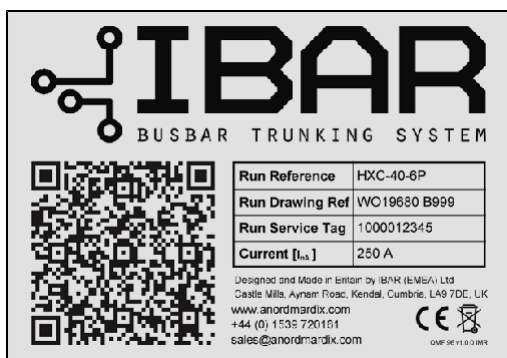
- [Creating a New Test Session](#)

- [Activation](#)
- [Completing a Test Certificate](#)

Creating an IBAR Installation Test Certificate

IBAR Installation test sessions should always be created against the master run service tag, not against one of the bar components.

A master run service tag looks like this; [scanning](#) it will bring up the run's Equipment Details screen, from where you can access its test sessions.



If you cannot find the master run service tag, you can [search](#) for the run (if you know its service tag number), or search for the [branch \(site\)](#) then you should find it listed under [Branch Equipment](#).

Main Test Session Screen

⚠ Warning

Before creating an IBAR Installation test session, an [IBAR Installation Joint Test](#) must be completed for each individual joint pack installed on the run.

After [creating](#) and [activating](#) the IBAR Installation Test, you will see the Test Certificate screen. It is completed in two steps.

- Complete the main test certificate, by selecting **IBAR installation test** under **Tests**
- [Sign off the test session](#)

Test Certificate

The test certificate is accessed from the main test session screen by selecting **IBAR installation test** under **Tests**.

The document should be completed, then press **< Test Certificate** at the top left to save the changes and navigate back to the main test session screen.


The document should be saved regularly in this way, and does not need to be completed all at once.

11:59 Thu 2 Apr

96%

< Test Certificate

QMF 139

IBAR
INDUSTRIAL TRAINING SYSTEM

IBAR Installation Test Certificate

Project	
Job Number	
Date	
Run Reference	
Drawing Number	
Equipment Rating	Ampere
Equipment Serial Number	
Service Tag Number	

VISUAL INSPECTION	PASS (Y/N)
Adjoining sections are level	<input type="checkbox"/>
Support brackets installed in accordance with IBAR HX Installation Guide	<input type="checkbox"/>
Support bracket fixing bolts are secure	<input type="checkbox"/>
Joints installed in accordance with IBAR HX Installation Guide and nuts paint marked	<input type="checkbox"/>
All covers are securely installed	<input type="checkbox"/>

CONTINUITY / RUN DUCTOR TEST													
FROM													
TO													
CONDUCTOR PAIR	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)	RESULT (mΩ)	
-													
-													
-													
-													
-													
-													
-													
-													
FROM													
TO													
CONDUCTOR PAIR	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)	RESULT (mΩ)	
-													
-													
-													
-													

Home

Sync

Scan

Scan History

Time Logs

Settings

Note that in this document, the conductor pairs are selected from a drop-down list.

CONDUCTOR PAIR	LINK (mΩ)	RESULT (mΩ)	LINK (mΩ)
-			
PE - E			
PE - N			
PE - N2			
PE - L1			
PE - L2			
PE - L3			
E - N			
E - N2			
E - L1			
E - L2			

Sign Off

When all documents have been completed, the test session should be [signed off following the usual procedure](#).

1.11.7 IBAR Installation Joint Tests

Creating, activating and completing an IBAR Installation Joint Test Certificate follows the same processes detailed on the following page, however further specific guidance on completing this type of test certificate can be found below.

- [Creating a New Test Session](#)
- [Activation](#)
- [Completing a Test Certificate](#)

Creating an IBAR Installation Joint Test Certificate

IBAR Installation test sessions should always be created against an individual joint pack on the run, not against the master run service tag.

A joint pack service tag looks like this; [scanning](#) it will bring up the joint pack's Component Details screen, from where you can access its test sessions.



If you cannot find the joint pack service tag, you can [search](#) for the joint pack (if you know its service tag number).

Setting Location In Run

Before starting an IBAR Installation Joint Test, the component's Location in the run must be set on the [Component Details](#) screen, by updating the following field.

Unit Description	>
Location	>
A	
Floor	>

Main Test Session Screen

After [creating](#) and [activating](#) the IBAR Installation Joint Test, you will see the Test Certificate screen. Unlike most other types of test session, it is completed in four steps.

- Ensure the joint pack's Location has been set (this must be done by [scanning](#) the joint pack service tag, then editing the **Location** on the [Component Details](#) screen)
- Complete the main test certificate, by selecting **IBAR installation joint test** under **Tests**
- Take a photo of the joint pack
- [Sign off the test session](#)

11:20 Fri 22 May 100%

< Test Sessions Test Certificate

DETAILS

Project Name
Telehouse East Building UPS System

Job Number
26883

Equipment Type
Joint Pack

Unit Reference
HXC-16-3P-JP

Unit Serial Number
26883/002/16/005

Service Tag Number
1000030827

Drawing Number

TESTS

Test
IBAR installation joint test

PHOTOS

Photo
Required For Sign Off

ADDITIONAL INFORMATION

Component Location
Required For Sign Off

Unit Rating
1600

Comments

SIGN OFF

Overall Result
In Progress

Signed For Anord Mardix

Signed By Witness

Home Sync Scan Scan History Time Logs Settings

Test Certificate


The test certificate is accessed from the main test session screen by selecting **IBAR installation joint test** under **Tests**.

The document should be completed, then press **< Test Certificate** at the top left to save the changes and navigate back to the main test session screen.

The document should be saved regularly in this way, and does not need to be completed all at once.








11:21 Fri 22 May 100%

< Test Certificate QMF 139_2


IBAR Installation Joint Test Certificate

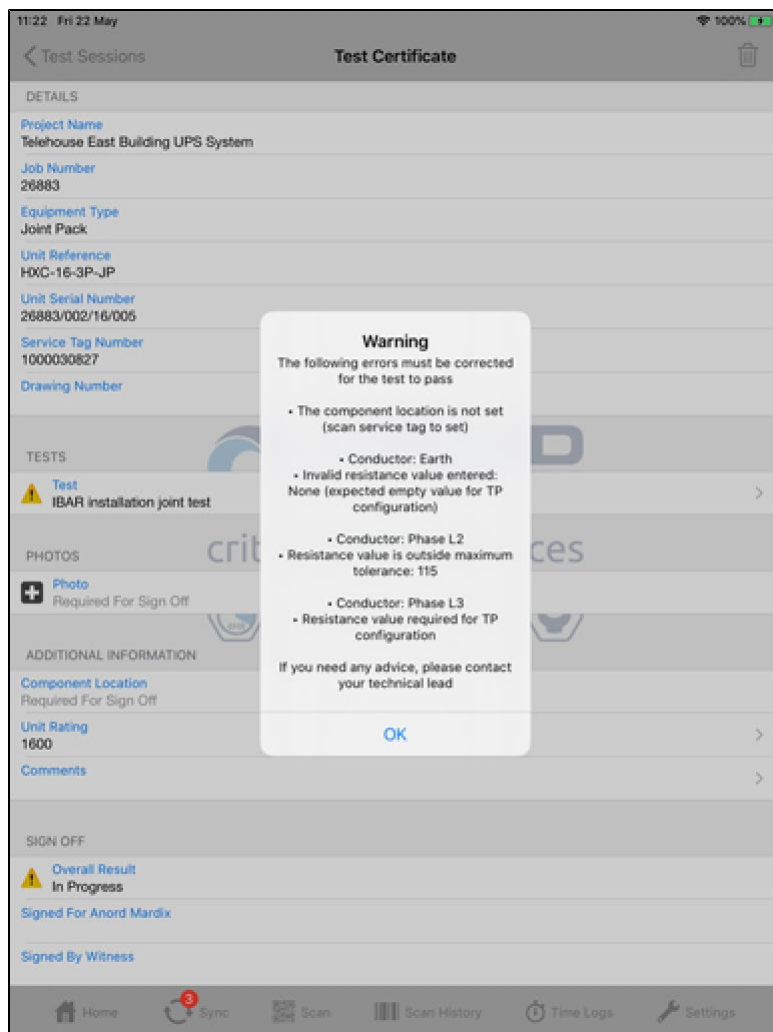
Project	Telehouse East Building UPS System		
Job Number	26863		
Date	22 May 2020		
Run Reference			
Drawing Number	26863-802revC		
Equipment Rating	1600		Ampere
Equipment Serial Number	26863/002/16/005		
Service Tag Number	1000030827		
Location in Run			

VISUAL INSPECTION	PASS (R)
Belleville washers seated correctly	<input checked="" type="checkbox"/>
Nut outer heads sheared off	<input checked="" type="checkbox"/>
Nuts single marked	<input checked="" type="checkbox"/>
Covers installed	<input checked="" type="checkbox"/>
TORQUE CHECK	PASS (R)
Bolts torque checked *	<input checked="" type="checkbox"/>
Torque wrench ID number	
DUCTOR TEST	RESISTANCE (uΩ)
Earth	
Neutral	
Neutral 2	
Phase L1	110
Phase L2	115
Phase L3	
Ductor test instrument ID number	
JOINT PHOTO	
COMMENTS	

 Home
  Sync
  Scan
  List
  History
  Time
  Settings

Upon navigating back from editing the test document, a warning will be displayed (and sign off prevented) if any of the following are detected

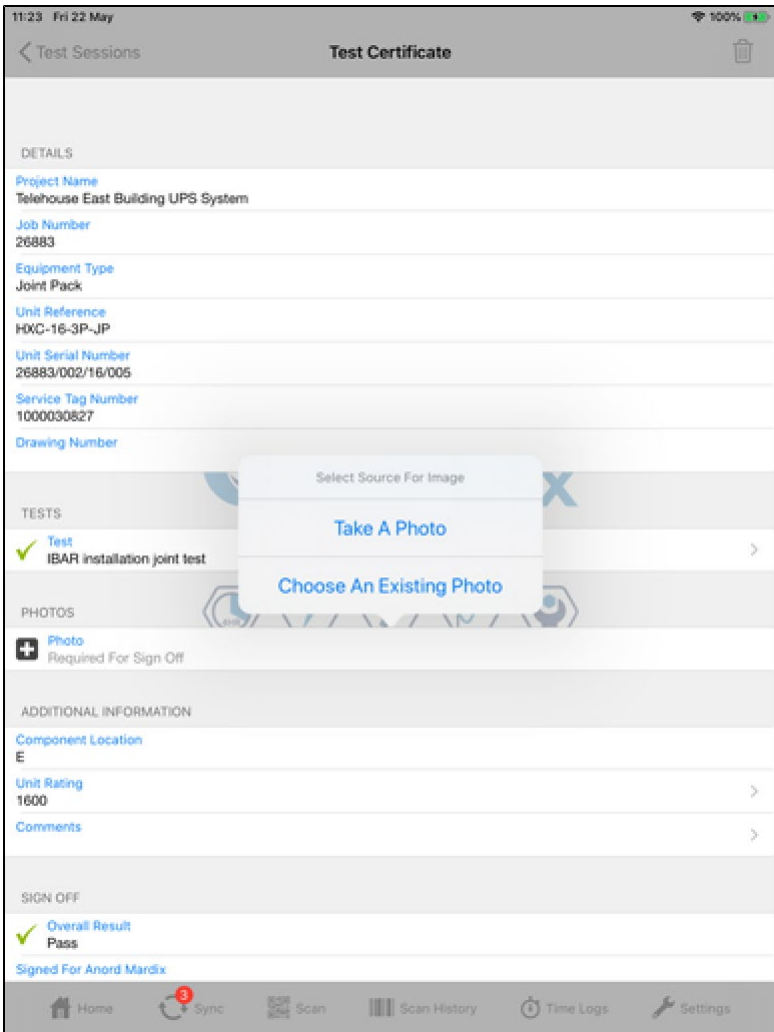
- joint pack location has not been set
- any required ductor resistance fields not completed, based on the bar's configuration (for example, a TP&N bar must have N/L1/L2/L3 completed)
- any ductor resistance fields have a value entered in excess of the maximum tolerance (this is set by the IBAR design team)
- any ductor resistance fields have an invalid value entered (required fields should only contain a numeric value; non-required fields should be empty or contain only a single dash)



Photo

To take a photo of the joint being tested, simply press Photo then select

- **Take A Photo** to take a new photo
- **Choose An Existing Photo** if you already have a photo of the joint in your camera roll on the device



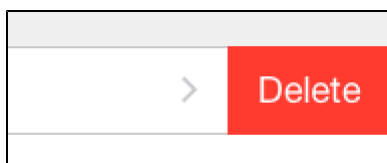
After taking a photo, select **Use Photo** to confirm selection.



After taking a photo, a thumbnail will be displayed above the **Photo** button. Tap on this to view the photo in full screen.

If you need to retake the photo, simply tap the **Photo** button again to take a new photo which will overwrite the old one.

If you need to delete the photo, swipe right-to-left from the end of the thumbnail row, which will reveal a hidden **Delete** button.



Sign Off

When all documents have been completed, the test session should be [signed off following the usual procedure](#).

Sign off will be allowed when

- joint pack location has been set
- photo has been taken
- test certificate has been completed in full
- all required ductor resistance fields (based on the bar's configuration) are completed, with all value within tolerance
- all non-required ductor resistance fields (based on the bar's configuration) are empty or contain only a single dash

11:25 Fri 22 May 100%

< Test Sessions Test Certificate

Job Number
26883

Equipment Type
Joint Pack

Unit Reference
HXC-16-3P-JP

Unit Serial Number
26883/002/16/005

Service Tag Number
1000030827

Drawing Number

TESTS

✓ Test
IBAR installation joint test

PHOTOS

Photo
Photo Successfully Taken

ADDITIONAL INFORMATION

Component Location
E

Unit Rating
1600

Comments

SIGN OFF

✓ Overall Result
Pass

Signed For Anord Mardix
Signature Required

Signed By Witness
Signature Required

Home Sync Scan Scan History Time Logs Settings

Photography Not Allowed On Site

The only exception to the above steps is where the works order has Photography Not Allowed On Site set.

This is set by the project manager in the main Vision web interface.

One of works only	<input type="checkbox"/>
Photography Not Allowed On Site	<input checked="" type="checkbox"/>
iControl Systems Administrator	Select ▾

For any joint tests on works orders for which photography is not permitted, a warning will be displayed and the **Photo** button disabled.

In this scenario, a photo is not required for sign off of the test session.

11:25 Fri 22 May

100%

Test Sessions

Test Certificate

DETAILS

Project Name

Job Number

Equipment Type

Joint Pack

Unit Reference

HXC-63-4P-JP

Unit Serial Number

18503/001/14/010

Service Tag Number

5000000456

Drawing Number

TESTS

Test

IBAR installation joint test

PHOTOS

Photo

Photography Not Allowed On Site

ADDITIONAL INFORMATION

Component Location

A

Unit Rating

6300

Comments

SIGN OFF

Overall Result

In Progress

Signed For Anord Mardix

Signed By Witness

Home

Sync

Scan

Scan History

Time Logs

Settings

1.11.8 RESINBAR Installation Joint Tests

Creating, activating and completing an RESINBAR Installation Joint Test Certificate follows the same processes detailed on the following page, however further specific guidance on completing this type of test certificate can be found below.

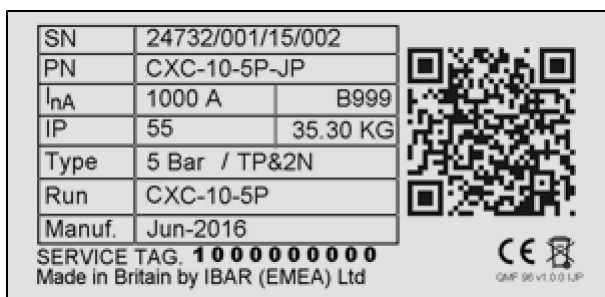
- [Creating a New Test Session](#)

- [Activation](#)
- [Completing a Test Certificate](#)

Creating a RESINBAR Installation Joint Test Certificate

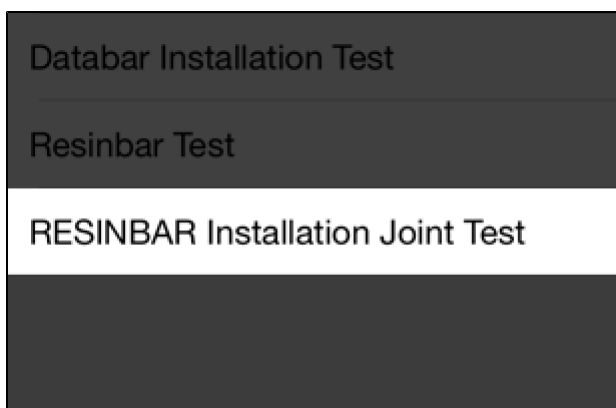
RESINBAR Installation test sessions should always be created against an individual joint pack on the run, not against the master run service tag.

A joint pack service tag looks like this; [scanning](#) it will bring up the joint pack's Component Details screen, from where you can access its test sessions.



If you cannot find the joint pack service tag, you can [search](#) for the joint pack (if you know its service tag number).

When creating the test session, **RESINBAR Installation Joint Test** should be selected.



Setting Location In Run

Before starting a RESINBAR Installation Joint Test, the component's Location in the run must be set on the [Component Details](#) screen, by updating the following field.

Unit Description	>
Location A	>
Floor	>

Main Test Session Screen

After [creating](#) and [activating](#) the RESINBAR Installation Joint Test, you will see the Test Certificate screen. Unlike most other types of test session, it is completed in four steps.

- Ensure the joint pack's Location has been set (this must be done by [scanning](#) the joint pack service tag, then editing the **Location** on the [Component Details](#) screen)
- Complete the main test certificate, by selecting **RESINBAR installation joint test** under **Tests**
- Take a photo of the joint pack
- [Sign off the test session](#)

08:36 Mon 8 Feb 64%

< Test Sessions Test Certificate

DETAILS

Project Name
Gemini Data Centre - Project Titan

Job Number
25808

Equipment Type
Joint Pack

Unit Reference
CXC-40-5P-JP

Unit Serial Number
25808/3111/17/004

Service Tag Number
1000057424

Drawing Number

TESTS

ANORD

Test
RESINBAR installation joint test

PHOTOS

criticalpowerservices

Photo
Required For Sign Off

ADDITIONAL INFORMATION

Component Location
Required For Sign Off

Unit Rating
4000

Comments

SIGN OFF

Overall Result
In Progress

Signed For Anord Mandix

Signed By Witness

Home Sync Scan Scan History Time Logs Settings

Test Certificate


The test certificate is accessed from the main test session screen by selecting **RESINBAR installation joint test** under **Tests**.

The document should be completed, then press **< Test Certificate** at the top left to save the changes and navigate back to the main test session screen.

The document should be saved regularly in this way, and does not need to be completed all at once.

08:36 Mon 8 Feb 64%

Test Certificate QMF 143_2



Resinbar Installation Joint
Test Certificate

Project	Gemini Data Centre - Project Titan				
Job Number	25808				
Date	08 Feb 2021				
Run Reference	LV-4A-TX CR				
Drawing Number	25808-8301revN				
Equipment Rating	4000	Ampere			
Equipment Serial Number	25808/0111/17/004				
Service Tag Number	1000057424				
Location in Run/Joint ID					

JOINT PACK VISUAL INSPECTION						PASS (R)	
Bar elements spaced correctly & joints installed in accordance with IBAR CX Installation Guide							
Nut outer heads sheared off							
JOINT PACK TORQUE CHECK						PASS (R)	
Bolts torque checked in accordance with IBAR CX Installation Guide							
Torque wrench ID number							
DUCTOR TEST	PE	Neutral	Neutral 2	Phase L1	Phase L2	Phase L3	
RESISTANCE (mΩ)							
Ductor test instrument ref:							
INSULATION RESISTANCE TEST		From (Joint ID):		To (Joint ID):			
TEST	RESULT (MΩ)		TEST	RESULT (MΩ)			
PE - N			L1 - L2				
PE - L1			L2 - L3				
PE - L2			L3 - L1				
PE - L3			Test voltage: 500VDC 1MΩ is the minimum pass result in this test (IEC 61911, IEC 61936 and IEC 61937) Typical results should be 100MΩ and consistent across all conductors. Refer to test regulations website under inspection.				
N - L1			Insulation resistance test Instrument ID Number				
N - L2							
N - L3							
CASTING MOULD VISUAL INSPECTION						PASS (R)	
Mould release applied							
Joint mould fitted centrally & level in both planes							
Mould securely fitted and all seals checked							
MIX (Casting mix should be stored in dry conditions between +20°C & +40°C)						PASS (R)	
Check casting bucket contents are in good condition and not expired (Resin is clear and filler is dry)							
Resin Batch No.				Hardener Batch No.			
Mix as per installation guide in a warm dry environment (between +20 & +30°C)							
ENVIRONMENTAL CHECK	HUMIDITY (%)				TEMPERATURE (°C)		
Environmental test instrument ID number							
CAST POUR (Start within 7mins of mix, do not let stand)						PASS (R)	
Casting environment suitable for pour (Temperature, Humidity, Protection from Rain/Wet)							
ENVIRONMENTAL CHECK	HUMIDITY (%)				TEMPERATURE (°C)		
Environmental test instrument ref:							

Home Sync Scan Scan History Time Logs Settings

08:36 Mon 8 Feb

QMF 143_2

IBAR

Resinbar Installation Joint Test Certificate

CURE & DE-MOULD INSPECTION	PASS (R)
Check casting has fully cured ready for de-moulding	<input type="checkbox"/>
Date & time all moulds removed (DD/MM/YY 00:00)	
Check casting for quality and remove sharp edges	<input type="checkbox"/>
AS DE-MOULDED & FINISHED CAST PHOTO (To show top surface, from same angle as the 'AS CAST' photo)	
COMMENTS (Log any imperfections, NOTIFY SUPERVISOR IMMEDIATELY of any abnormalities)	
Apply completed Anord Mardix sign off label to a visible surface	COMPLETE (R)
<div><div>ANORD MARDIX</div><div>Resinbar Joint</div><div>Date:</div><div>Time:</div><div>Signature:</div></div>	<input type="checkbox"/>
Date of completion & sign for by signatories (DD/MM/YY)	
All the above tests have been successful:	
Signed for Anord Mardix IBAR (EMEA) Ltd:	Signed for Witness:
Name:	Name:

Home

Sync

Scan

Scan History

Time Logs

Settings

Note in particular the **Date of completion & sign for by signatories** date field towards the bottom of the document.

Apply completed Anord Mardix sign off label to a visible surface

ANORD MARDIX

Resinbar Joint

Date:

Time:

Signature:

COMPLETE (R)

☐

Date of completion & sign for by signatories (DD/MM/YY)

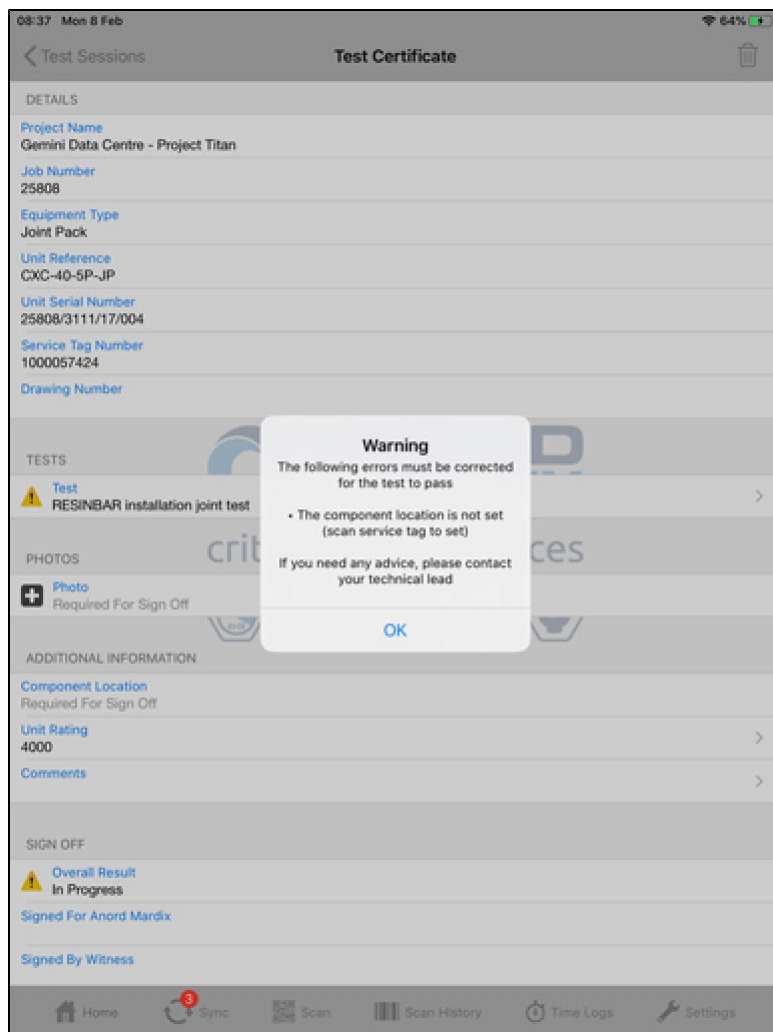
All the above tests have been successful:

Signed for Anord Mardix IBAR (EMEA) Ltd:

Signed for Witness:

Upon navigating back from editing the test document, a warning will be displayed (and sign off prevented) if any of the following are detected

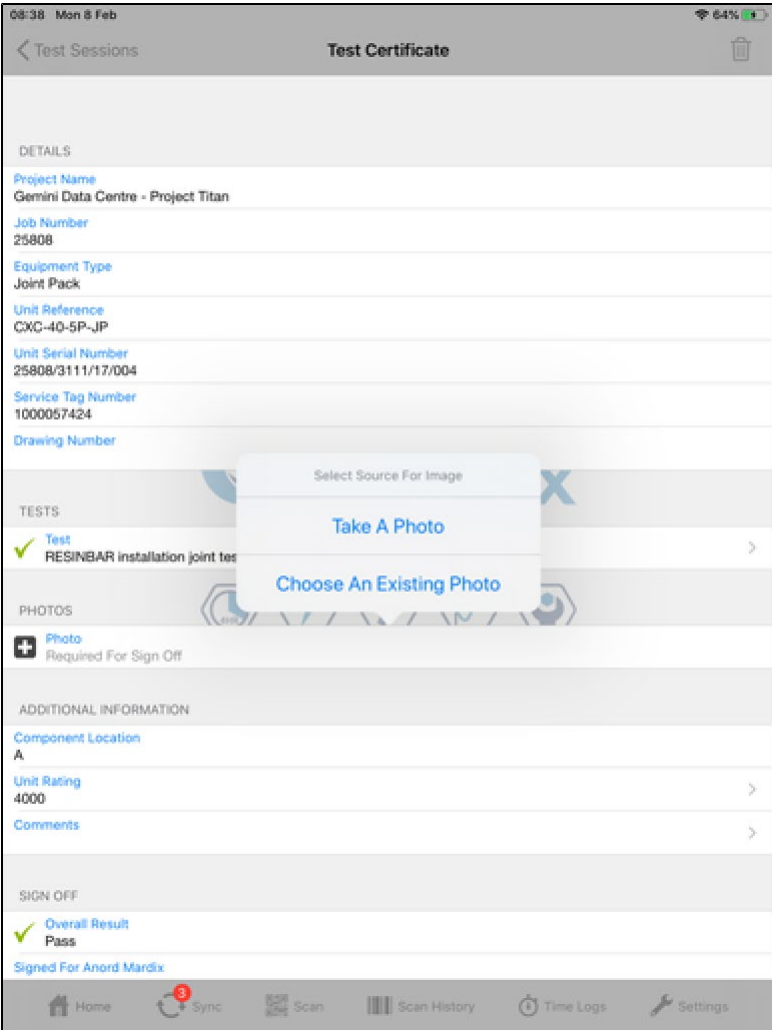
- joint pack location has not been set



Photo

To take a photo of the joint being tested, simply press Photo then select

- **Take A Photo** to take a new photo
- **Choose An Existing Photo** if you already have a photo of the joint in your camera roll on the device



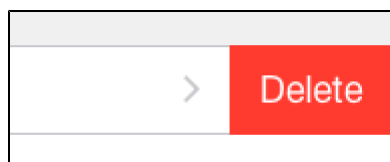
After taking a photo, select **Use Photo** to confirm selection.



After taking a photo, a thumbnail will be displayed above the **Photo** button. Tap on this to view the photo in full screen.

If you need to retake the photo, simply tap the **Photo** button again to take a new photo which will overwrite the old one.

If you need to delete the photo, swipe right-to-left from the end of the thumbnail row, which will reveal a hidden **Delete** button.

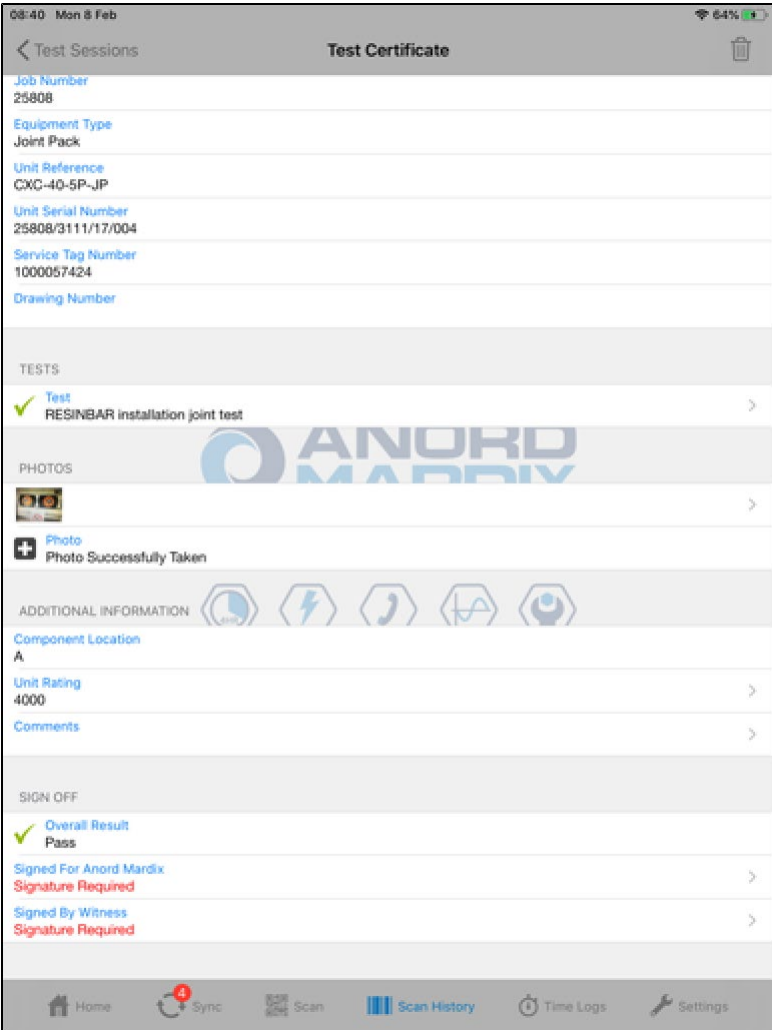


Sign Off

When all documents have been completed, the test session should be [signed off following the usual procedure](#).

Sign off will be allowed when

- joint pack location has been set
- photo has been taken
- test certificate has been completed in full, in particular with all checkboxes selected



Photography Not Allowed On Site

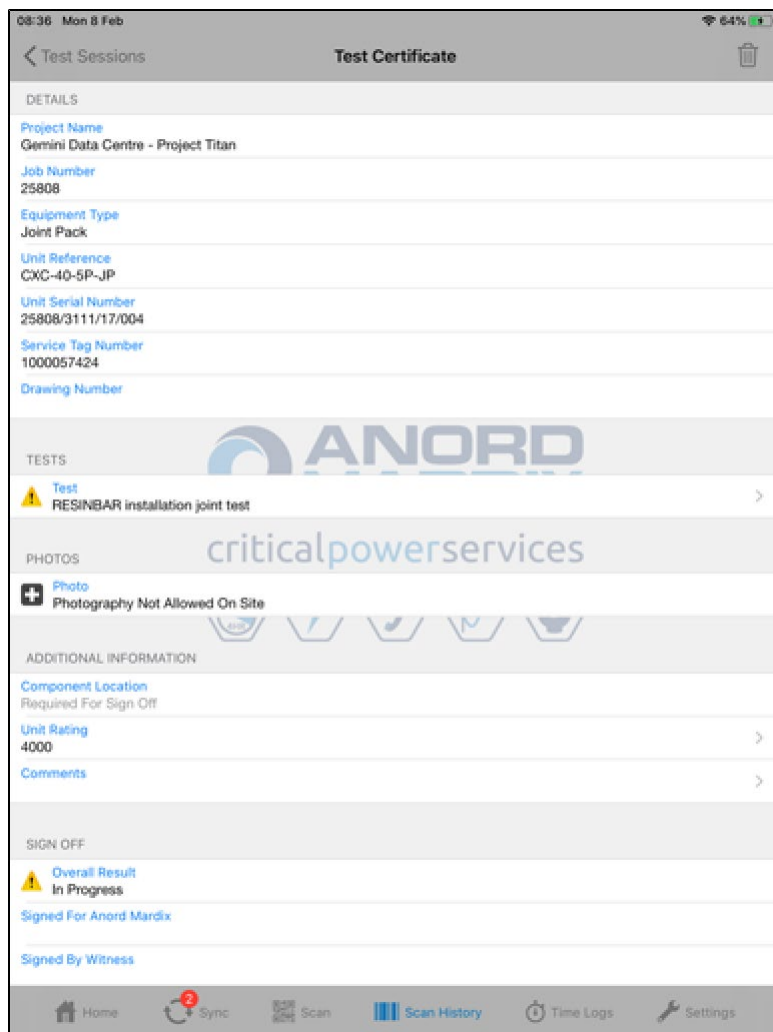
The only exception to the above steps is where the works order has Photography Not Allowed On Site set.

This is set by the project manager in the main Vision web interface.

One of works only	<input type="checkbox"/>
Photography Not Allowed On Site	<input checked="" type="checkbox"/>
iControl Systems Administrator	Select ▾

For any joint tests on works orders for which photography is not permitted, a warning will be displayed and the **Photo** button disabled.

In this scenario, a photo is not required for sign off of the test session.

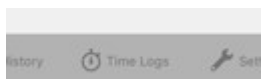


1.12 Time Logs

The Time Logs section allows time to be logged relating to site works.

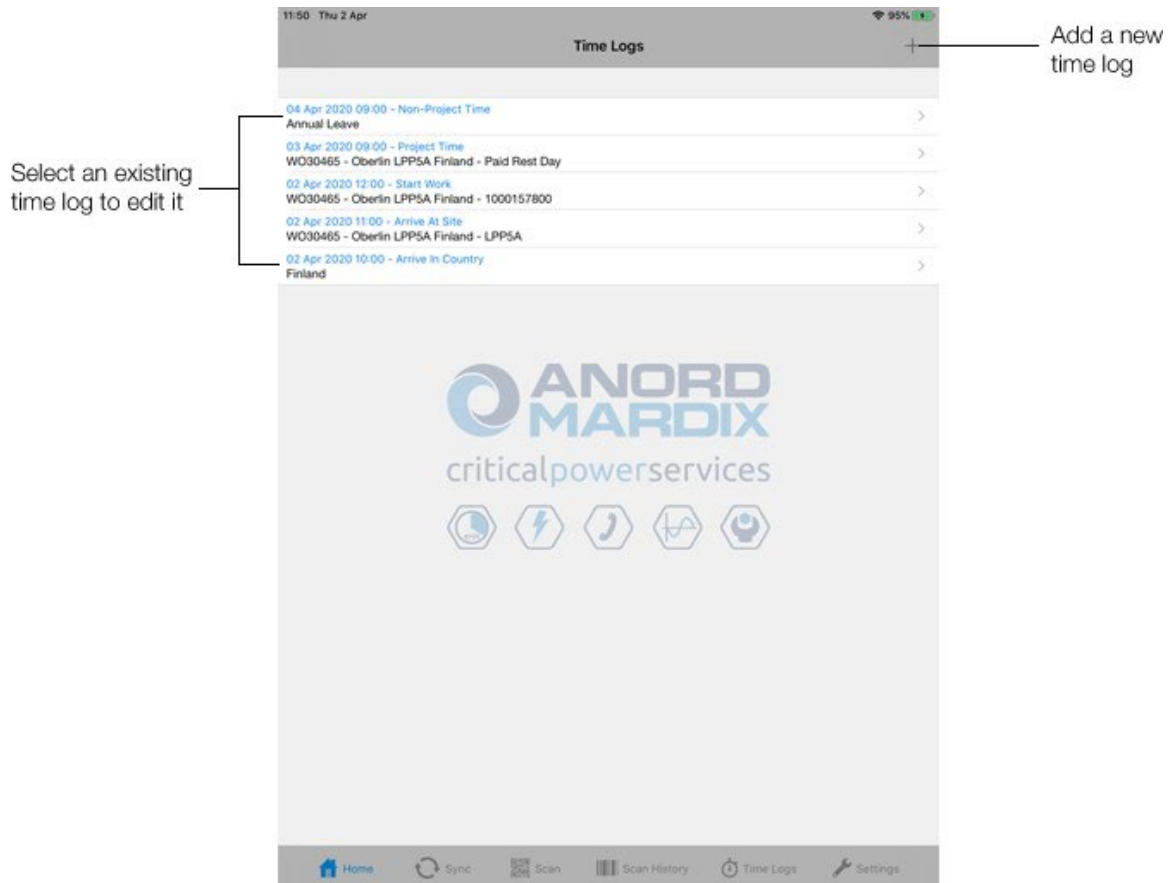
1.12.1 Time Logs Screen

The Time Logs section can be accessed from the **Time Logs** icon on the tab bar at the bottom of the screen.



On the main Time Logs screen, any existing time log will be listed most recent first. These can be edited by simply selecting them.

New time logs can be added by using the **+** icon at the top right of the screen.

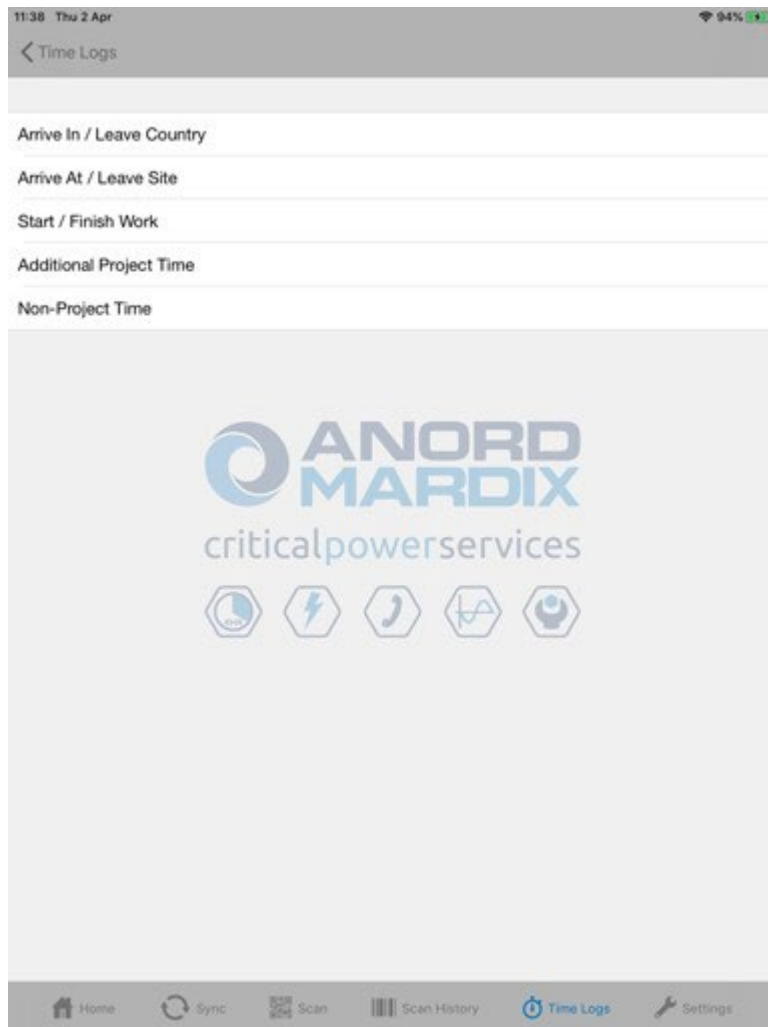


1.12.2 Adding a New Time Log

When adding a new time log, you can create one of the following types of log.

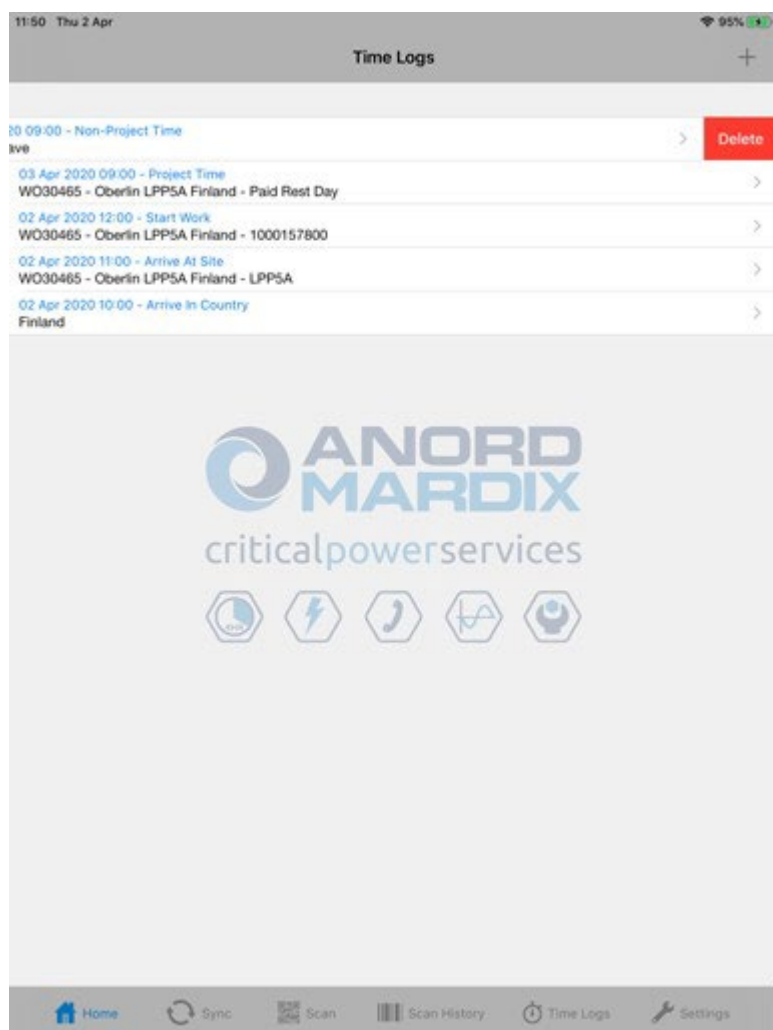
Each type is explained in more details using the links below.

- [Arrive In / Leave Country](#)
- [Arrive At / Leave Site](#)
- [Start / Finish Work](#)
- [Additional Project Time](#)
- [Non-Project Time](#)



1.12.3 Deleting a Time Log

Any unsynced time logs can be deleted by swiping right-to-left at the end of the screen to reveal the **Delete** button.



1.12.4 Syncing Up Time Logs

Time logs can be synced up using the [Upload Sync](#).

1.12.5 Arriving At or Leaving Site

When logging arrival or departure from a site, you will need to enter the following information.

- Site
- Arrive or Leave
- Date and Time

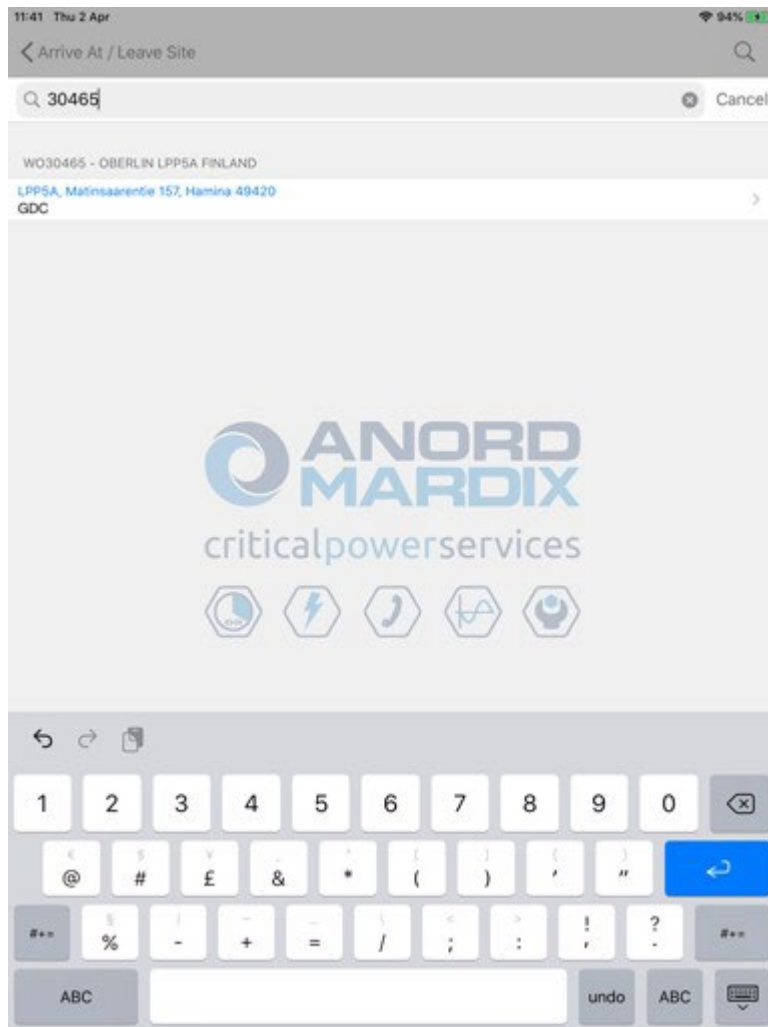
The screenshot shows the 'Arrive At / Leave Site' screen of the iOS Engineer App. At the top, there is a status bar with the time '11:45', date 'Thu 2 Apr', and battery level '95%'. Below the status bar is a header bar with 'Cancel' on the left, 'Arrive At / Leave Site' in the center, and 'Done' on the right. The main content area contains four form fields, each with a magnifying glass icon on the right: 'Site' (Required Field), 'Works Order' (Select Site), 'Arrive/Leave' (Required Field), and 'Date/Time (Local Time)' (Required Field). In the center of the screen is the ANORD MARDIX criticalpowerservices logo, which includes five icons: a hexagon with a circle, a lightning bolt, a telephone handset, a waveform, and a hexagon with a circle. At the bottom is a navigation bar with six icons and labels: Home, Sync, Scan, Scan History, Time Logs, and Settings.

The Site is selected from a lookup.

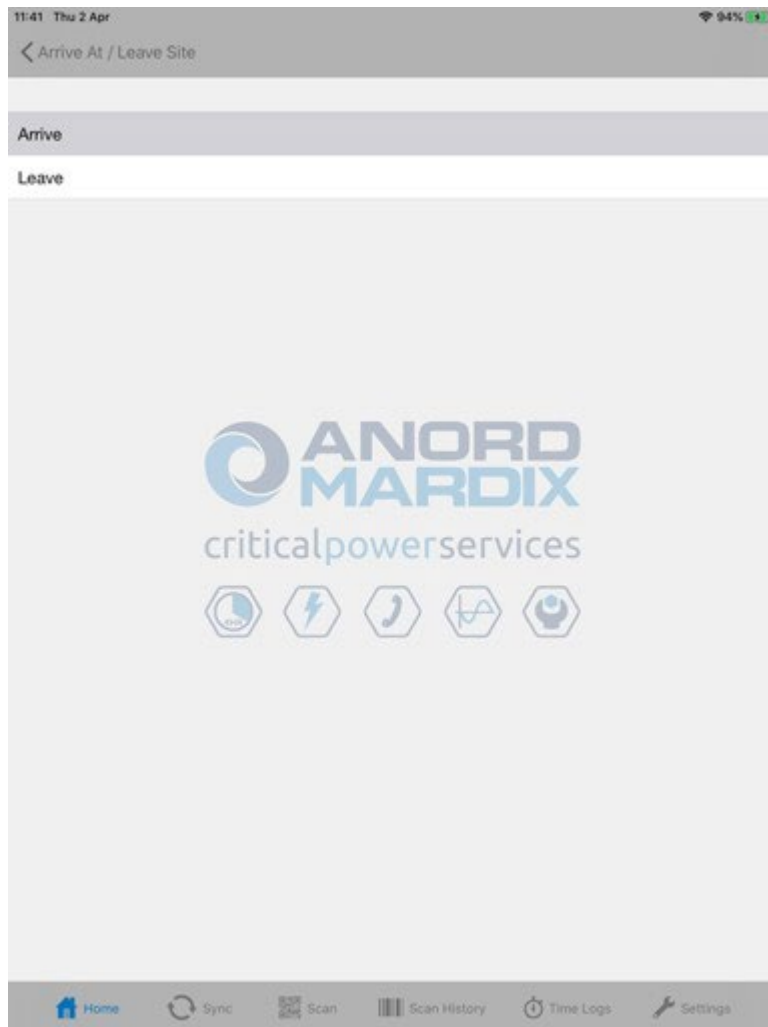
Search for the works order number in the search box (e.g. 30465), then tap the magnifying glass icon.



From the list of results, select the site under the relevant works order.
Note that selecting a site will also set the works order for the time log.



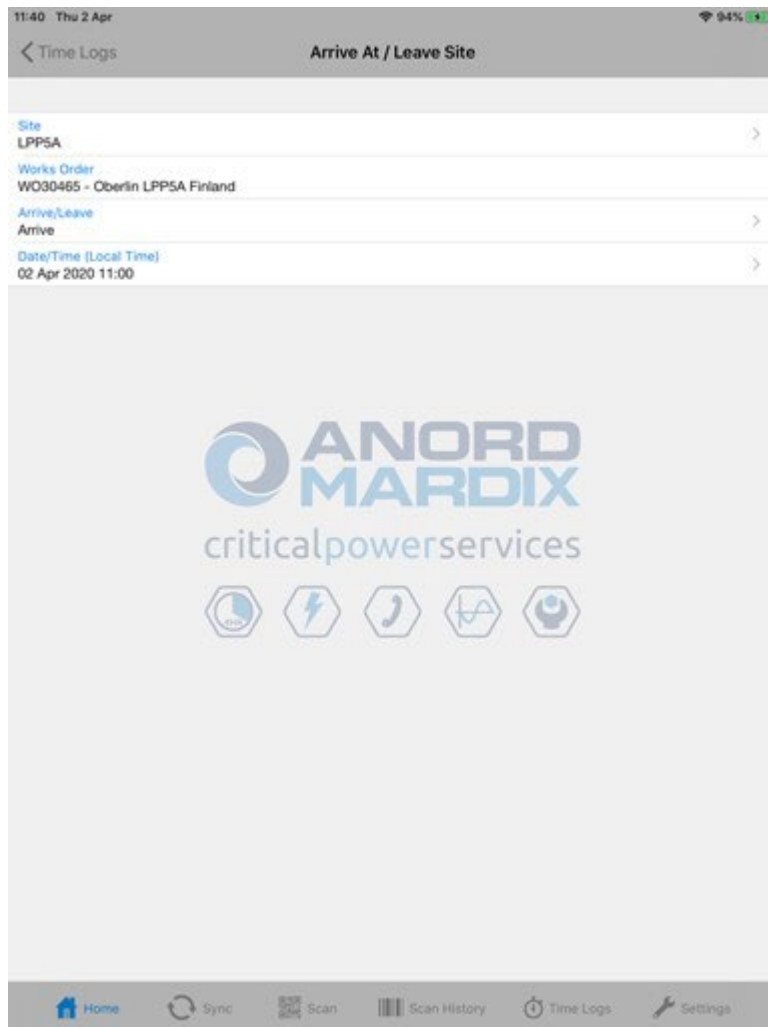
Arrive or Leave is selected from a list.



The Date and Time is selected from a date picker. This will default to the current date and time. After setting the date and time, use the back arrow at the top left of the screen to confirm.



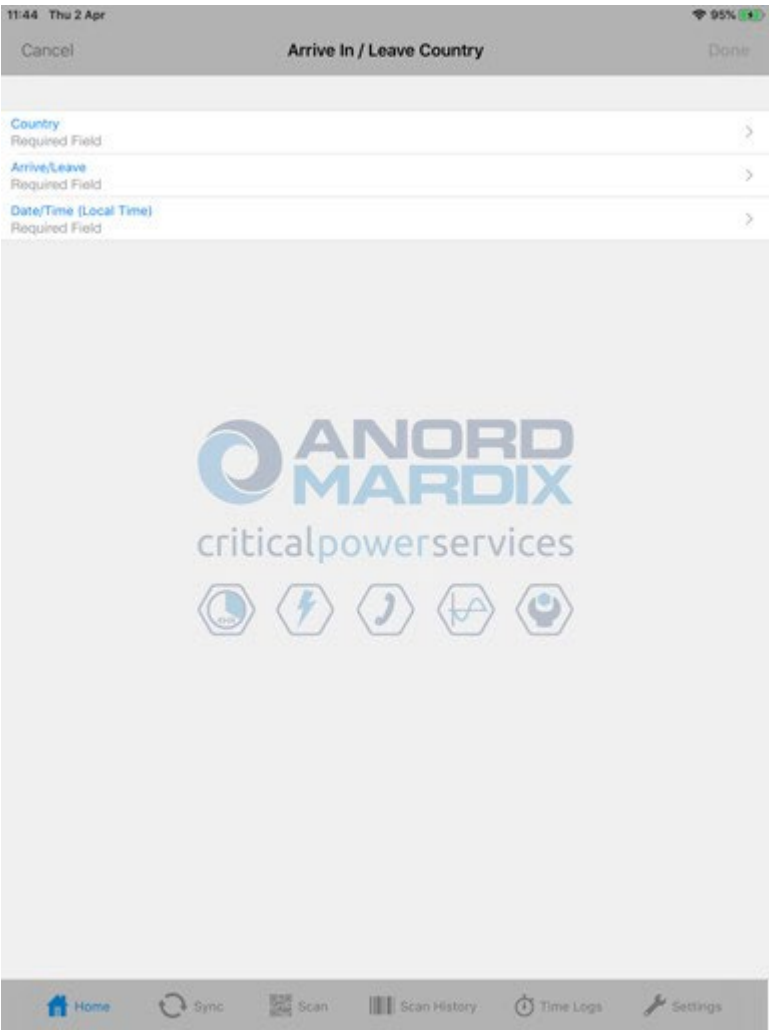
When all required information has been set, press **Done** to save the time log.



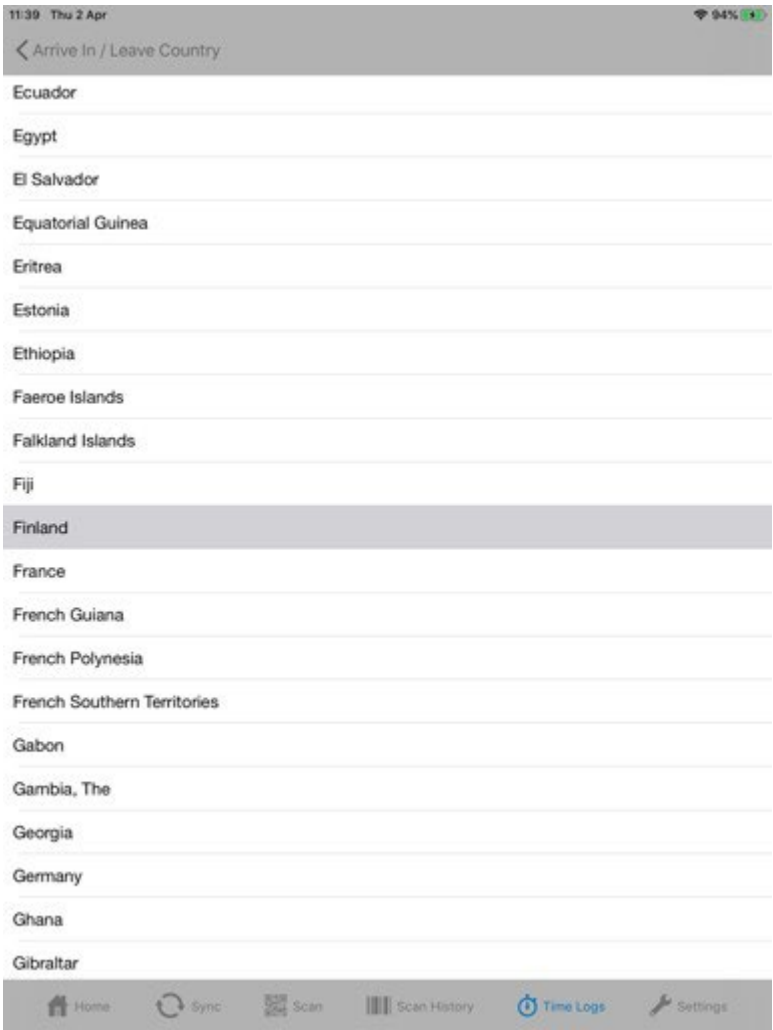
1.12.6 Arriving In or Leaving a Country

When logging arrival or departure from a country, you will need to enter the following information.

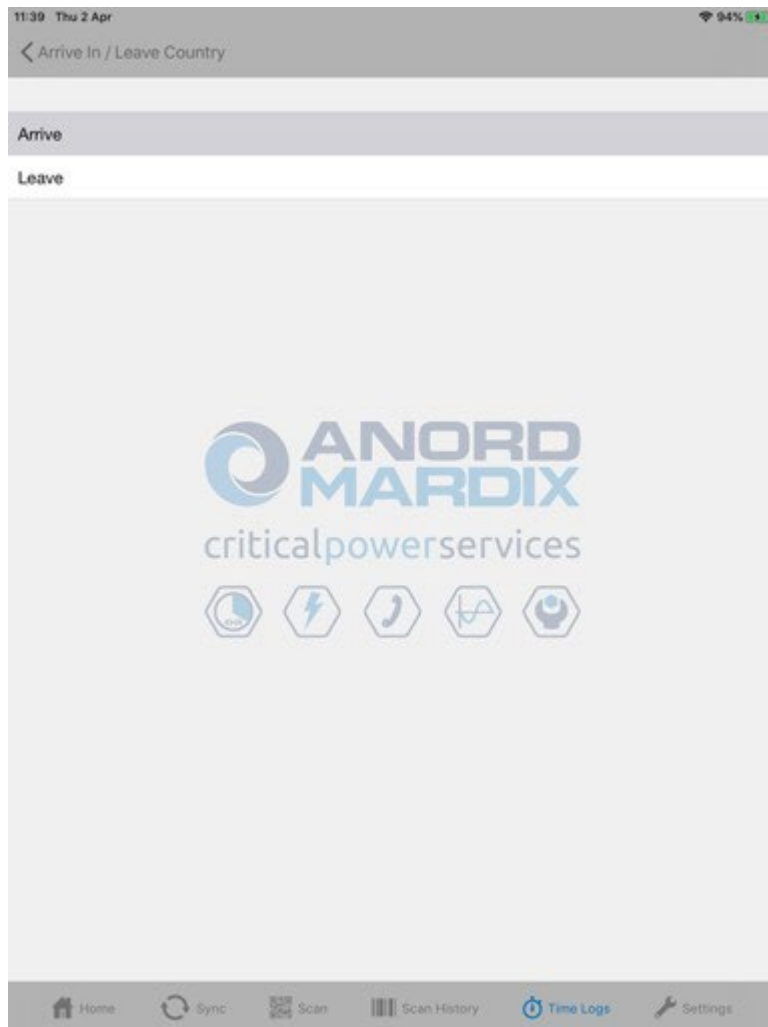
- Country
- Arrive or Leave
- Date and Time



The Country is selcted from a list, presented in alphabetical order.



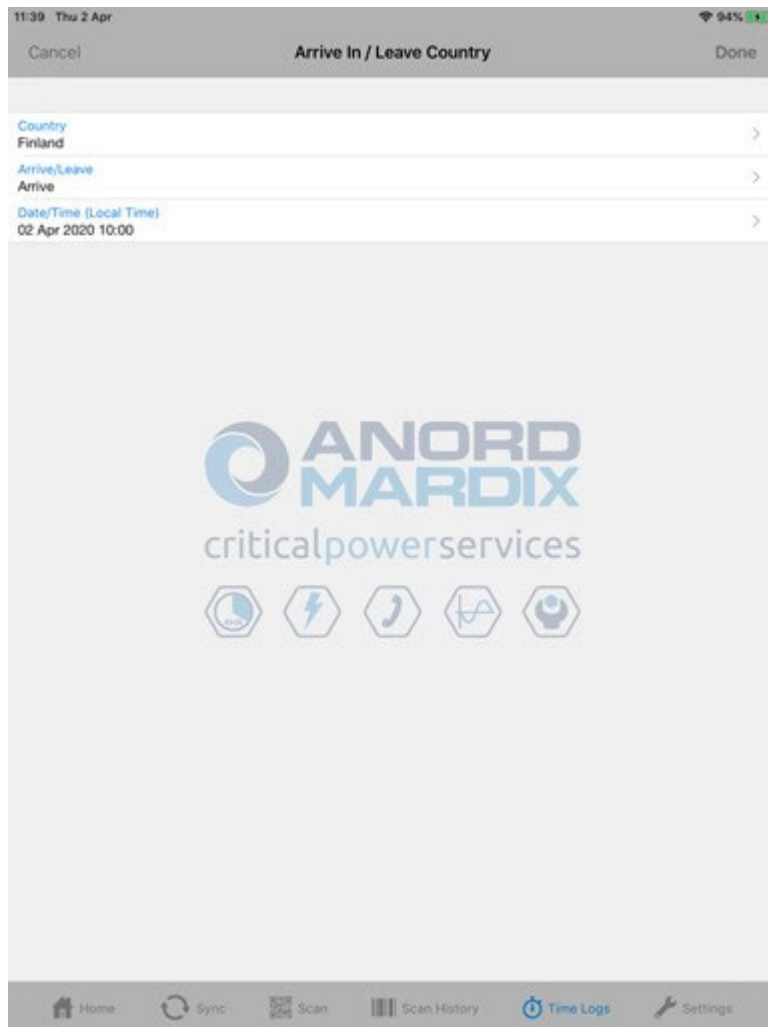
Arrive or Leave is selected from a list.



The Date and Time is selected from a date picker. This will default to the current date and time. After setting the date and time, use the back arrow at the top left of the screen to confirm.



When all required information has been set, press **Done** to save the time log.



1.12.7 Logging Additional Project Time

When logging additional project time, you will need to enter the following information.

- Time Log Type
- Site
- Start Date and Time
- Finish Date and Time

11:47 Thu 2 Apr 95%

Cancel Additional Project Time Done

Time Log Type
Required Field

Site
Required Field

Works Order
Select Site

Start Date/Time (Local Time)
Required Field

Finish Date/Time (Local Time)
Required Field

ANORD MARDIX
criticalpowerservices

Icons: A circular icon with a gear, a lightning bolt, a telephone handset, a waveform, and a person icon.

Home Sync Scan Scan History Time Logs Settings

The type of time log is selected from a list.

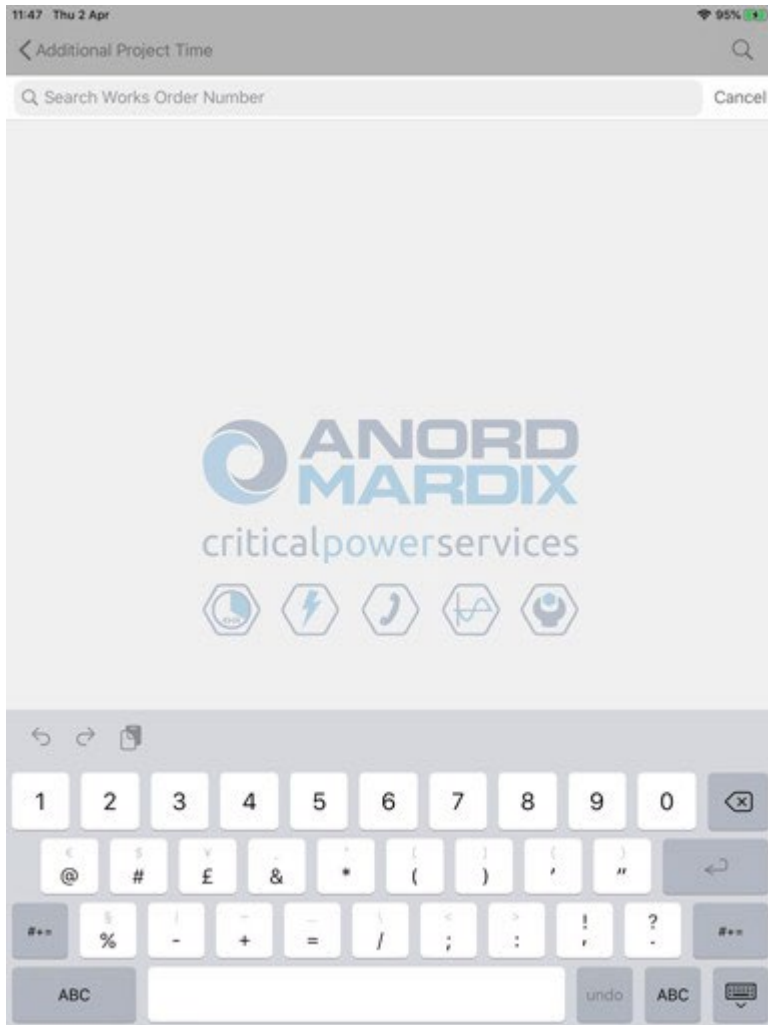
For additional project time, the options are

- Travel Time
- Paid Rest Day
- Paid Hours For No Work
- Site Subs (UK)
- Site Subs (Outside UK)
- Site Closed

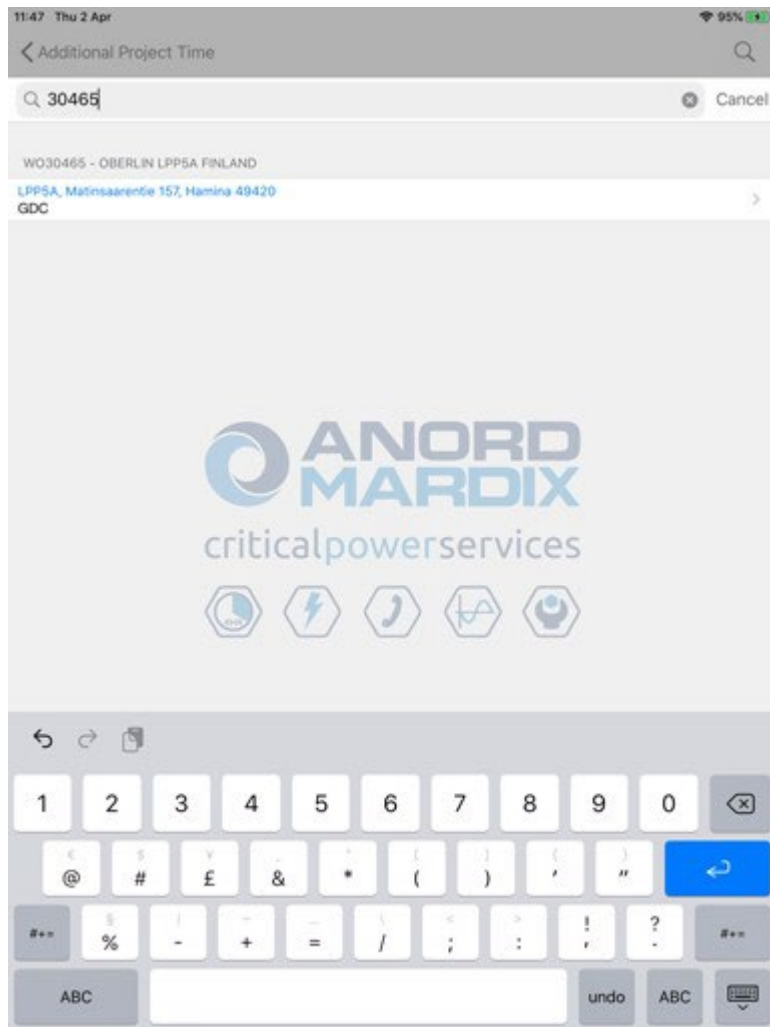


The Site is selected from a lookup.

Search for the works order number in the search box (e.g. 30465), then tap the magnifying glass icon.



From the list of results, select the site under the relevant works order.
 Note that selecting a site will also set the works order for the time log.



Both the Start Date and Time and Finish Date and Time are selected from a date picker. This will default to the current date and time.

After setting the date and time, use the back arrow at the top left of the screen to confirm.



When all required information has been set, press **Done** to save the time log.

11:49 Thu 2 Apr 95%

Cancel Additional Project Time Done

Time Log Type
Paid Rest Day

Site
LPP5A

Works Order
WO30465 - Oberlin LPP5A Finland

Start Date/Time (Local Time)
03 Apr 2020 09:00

Finish Date/Time (Local Time)
03 Apr 2020 17:00

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criticalpowerservices

Home Sync Scan Scan History Time Logs Settings

1.12.8 Logging Non-Project Time

When logging non-project time, you will need to enter the following information.

- Time Log Type
- Start Date and Time
- Finish Date and Time

11:49 Thu 2 Apr 95%

Cancel Non-Project Time Done

Time Log Type
Required Field

Start Date/Time (Local Time)
Required Field

Finish Date/Time (Local Time)
Required Field

ANORD MARDIX
criticalpowerservices

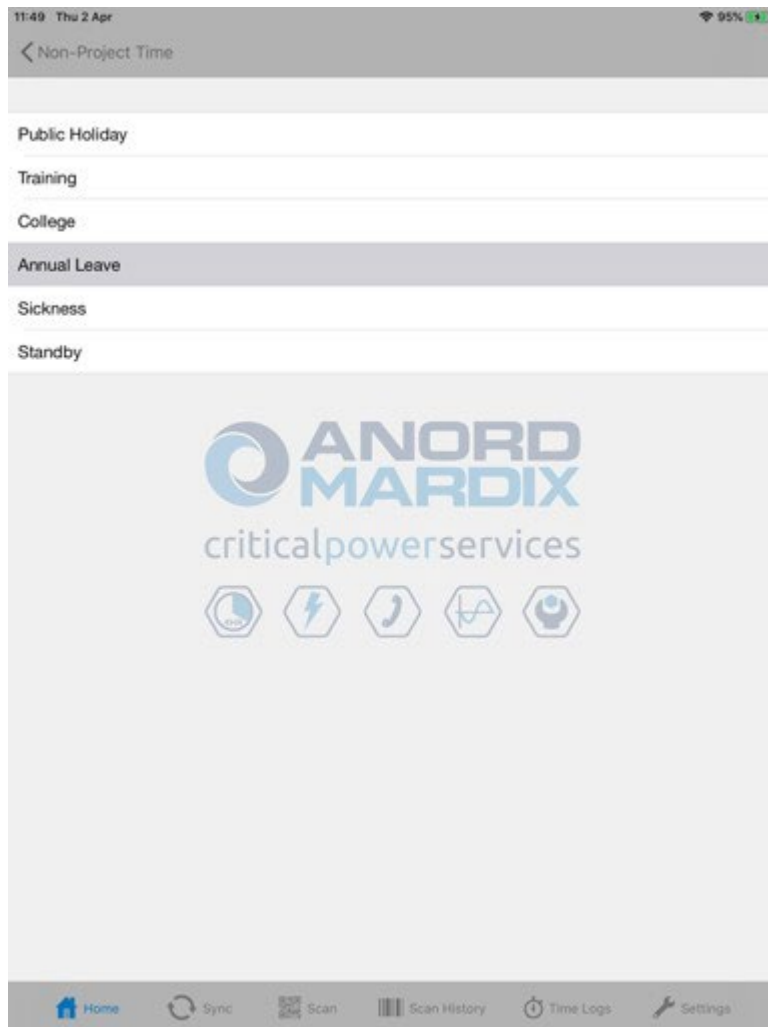
Icons: A circular icon with a gear, a lightning bolt, a telephone handset, a waveform, and a person icon.

Home Sync Scan Scan History Time Logs Settings

The type of time log is selected from a list.

For non-project time, the options are

- Public Holiday
- Training
- College
- Annual Leave
- Sickness
- Standby



Both the Start Date and Time and Finish Date and Time are selected from a date picker. This will default to the current date and time.

After setting the date and time, use the back arrow at the top left of the screen to confirm.



When all required information has been set, press **Done** to save the time log.

11:50 Thu 2 Apr 95%

Cancel Non-Project Time Done

Time Log Type
Annual Leave

Start Date/Time (Local Time)
04 Apr 2020 09:00

Finish Date/Time (Local Time)
04 Apr 2020 17:00

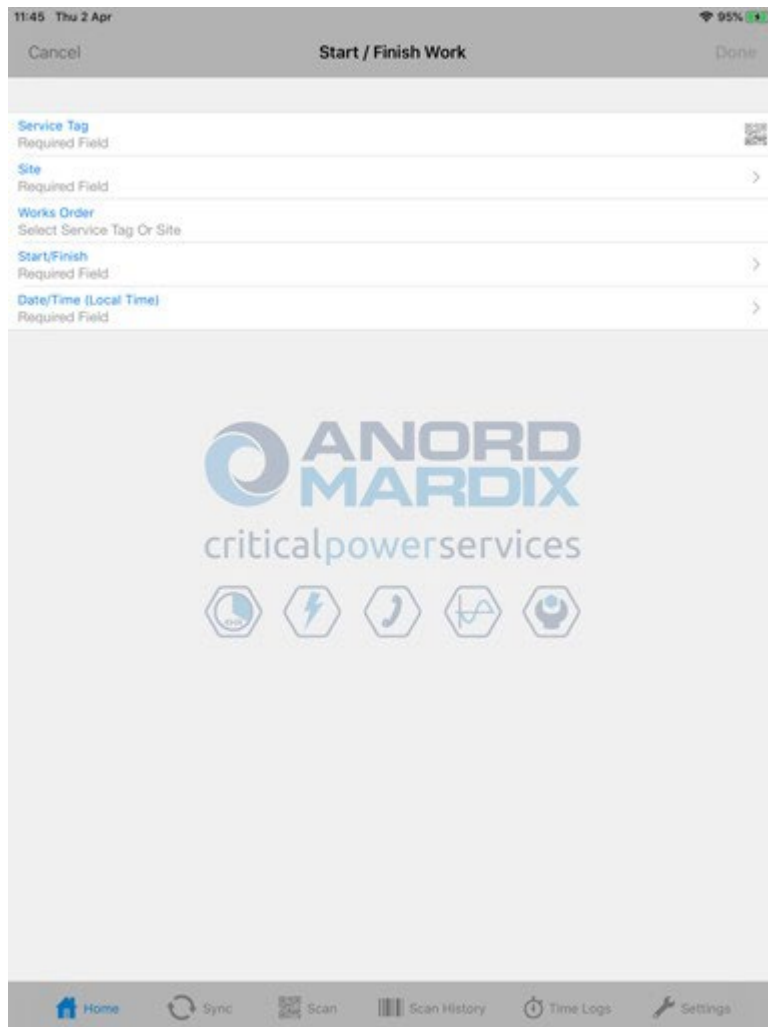
ANORD MARDIX
criticalpowerservices

Home Sync Scan Scan History Time Logs Settings

1.12.9 Logging Work

When logging starting or finishing work, you will need to enter the following information.

- Service Tag (by scanning), or Site if no service tag is available
- Arrive or Leave
- Date and Time



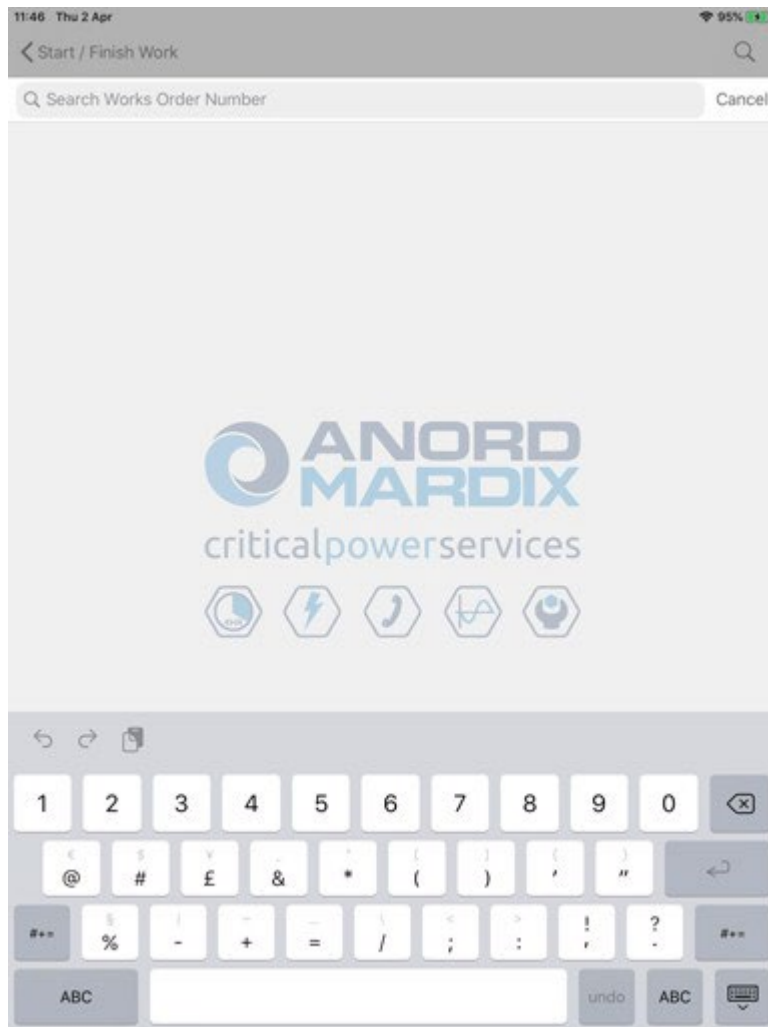
After selecting Service Tag, simply scan the service tag to select the equipment item or component.

Note that selecting scanning a service tag will also set the site and works order for the time log.

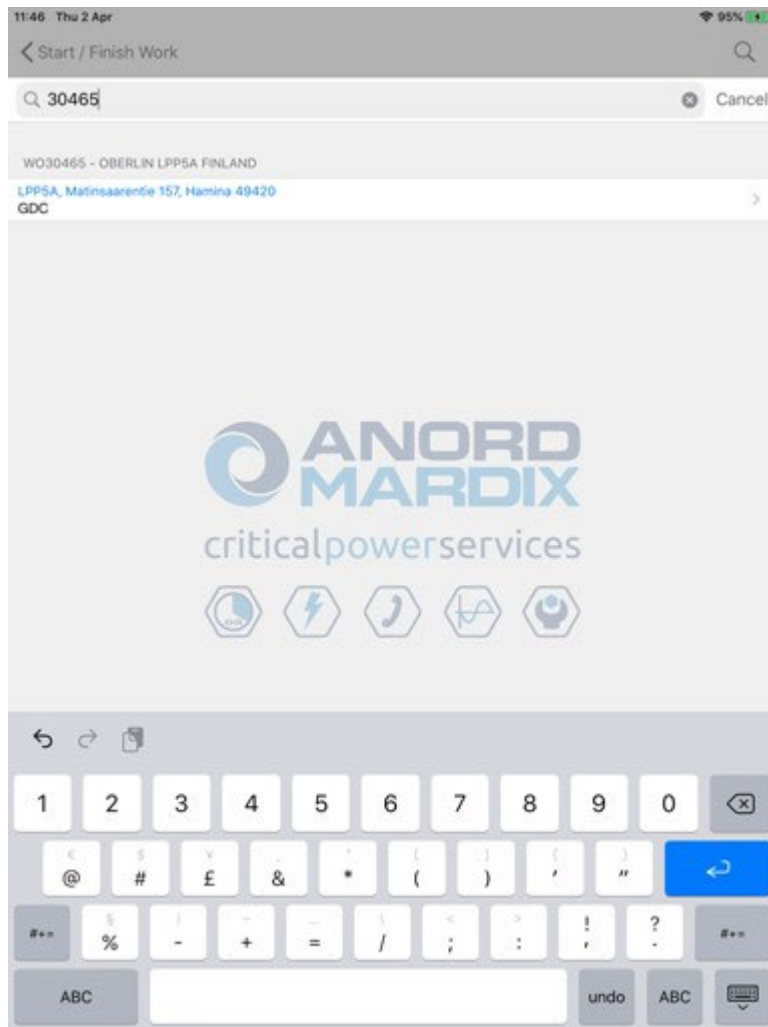


If no service tag is available to scan, you can simply log work against the site instead. The Site is selected from a lookup.

Search for the works order number in the search box (e.g. 30465), then tap the magnifying glass icon.

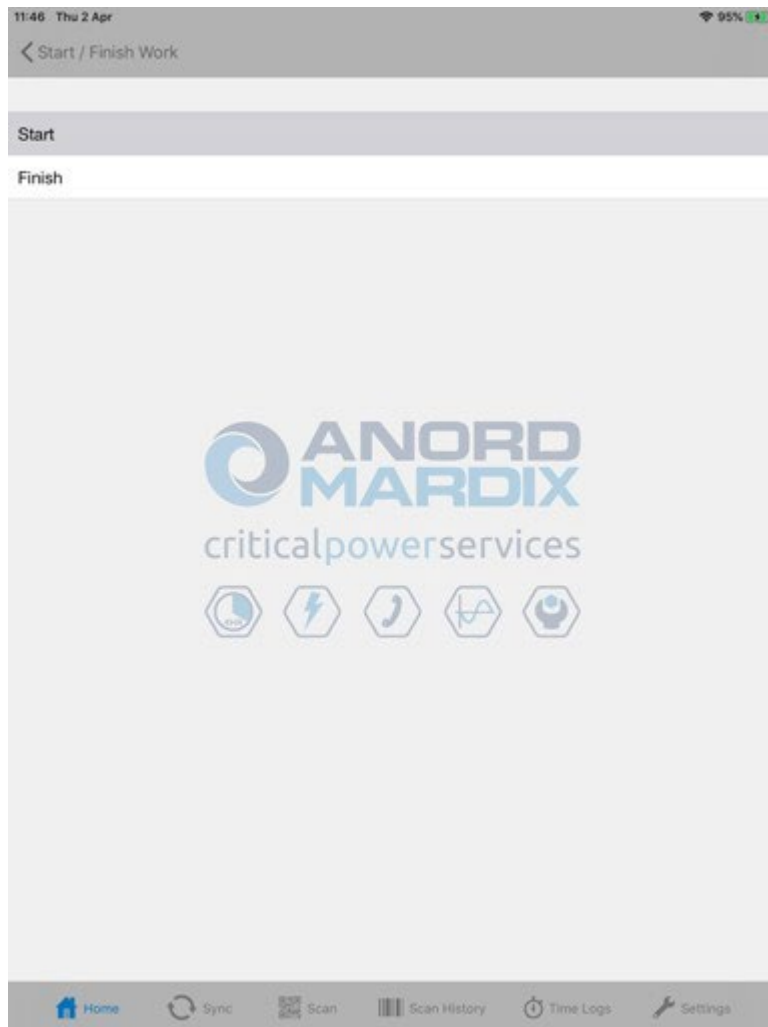


From the list of results, select the site under the relevant works order.
Note that selecting a site will also set the works order for the time log.



Start or Finish is selected from a list.

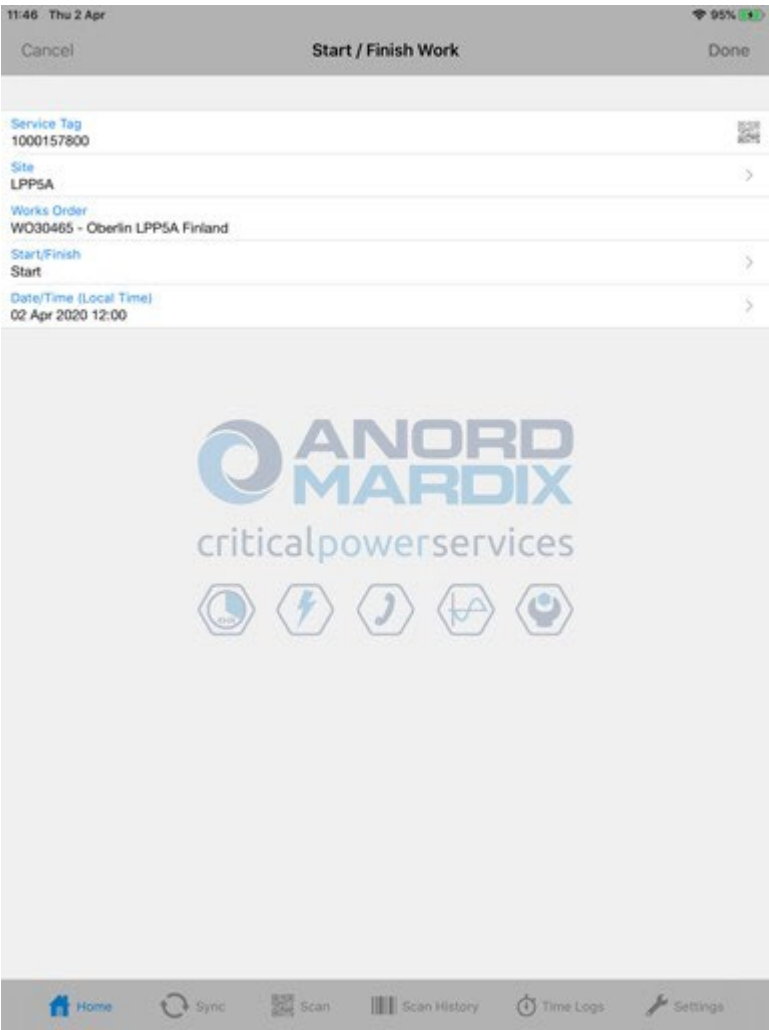
Note that a 'Start Work' log will be automatically terminated if you then start a new work log, or if you log leaving the site - so you do not have to log a 'Finish Work' log each time.



The Date and Time is selected from a date picker. This will default to the current date and time. After setting the date and time, use the back arrow at the top left of the screen to confirm.

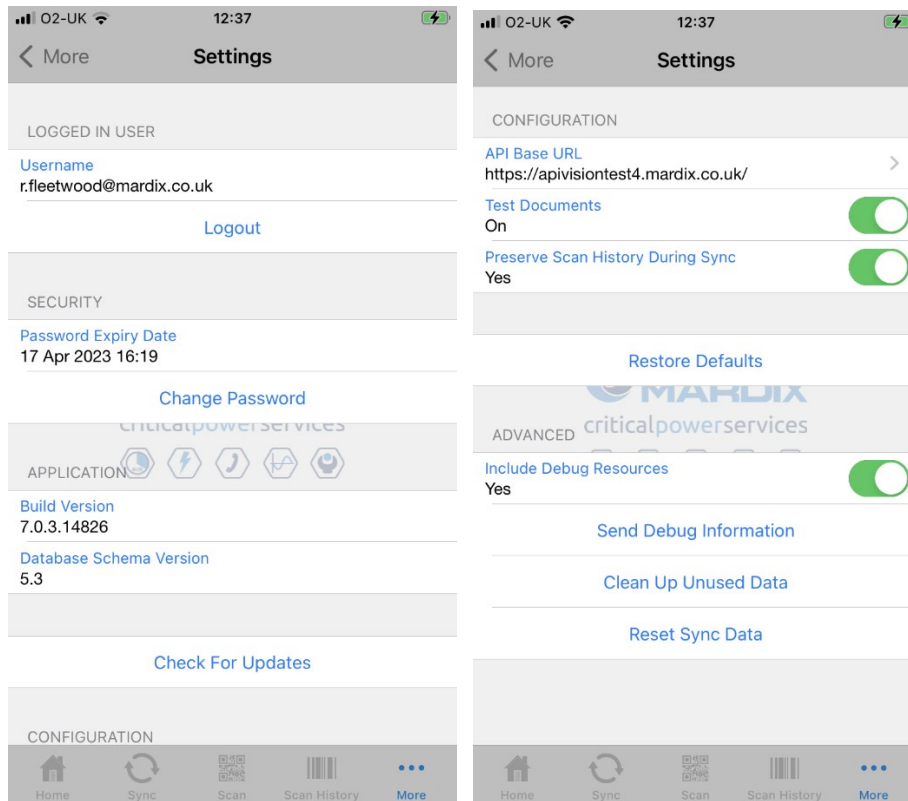


When all required information has been set, press **Done** to save the time log.



1.13 Settings

The Settings screen is used to display general system information, and to change some of the app settings.



The information displayed on this screen includes

- details of the user currently logged in
- password expiry date & time
- application and database version numbers
- base URL of the API (the https web service that the app contacts to exchange information with the server)

There are also a number of action that can be performed on this screen.

- **Logout** logs the current user out and returns you to the login screen
- **Change Password** allows the current user to change their Anord Mardix Vision password at anytime
- **Check For Updates** opens up the [installation web page](#) if you need to update the app to the latest version; you will normally be notified when an update is available

- **Restore Defaults** resets all app settings to their default values



If you are **updating** the app, unless otherwise stated you must ensure all data is **fully synced up**, as otherwise you may lose any unsynced data.

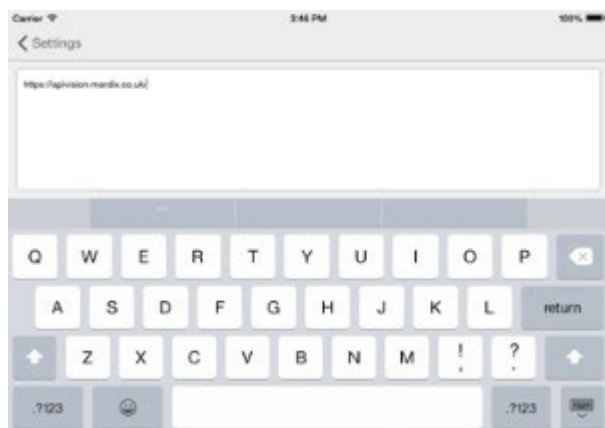
1.13.1 Changing App Settings

The Settings screen also allows you to make changes to some of the app settings. Note the **Restore Defaults** button will set these back to their default settings.

The **Test Documents** functionality can be turned on or off, depending on whether the engineer needs to use this functionality or not. If it is turned off, the test documents screens are simply hidden from view.

Preserve Scan History During Sync, if set to on, will ensure that any items listed in the **Scan History** will remain following a full download sync. Under normal operation, all items in the scan history are cleared during a full sync.

The **API Base URL** is the base URL of the https web service that the app contacts to exchange information with the server. This should only be changed under direction from the Anord Mardix software support team.



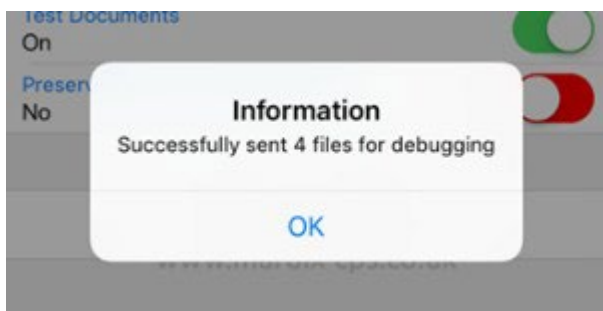
1.13.2 Sending Debug Information

In extreme cases (for example during major sync problems), it is sometimes necessary to send debug information about the app to the Anord Mardix software support team. This can be done easily by tapping on **Send Debug Information**.

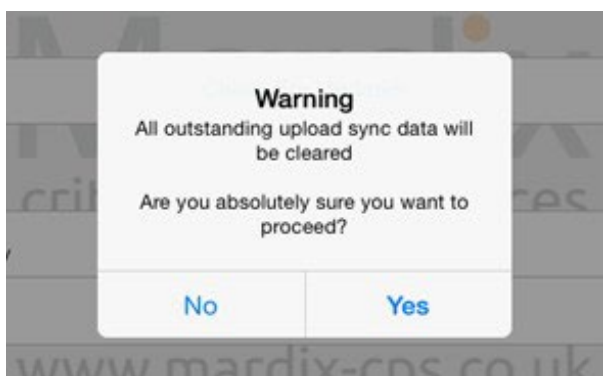


It is recommended to also ensure that **Include Debug Resources** is turned on before sending debug information, especially if you are having problems **syncing data up**, as this will ensure any unsynced information is also sent, helping to prevent data loss.

A progress icon will appear, followed by a message informing you that a number of files have been successfully sent for debugging.



Once you have sent the debug information, if you are having problems syncing up then you can reset any outstanding sync data by tapping on **Reset Sync Data**. As this is a fairly extreme option, you will receive a prompt first.



Before resetting sync data, if you do not want to lose any data you **must** send the debug information with debug resources included (as described above).

After resetting sync data, the red badge on the **Sync** tab icon (signifying the number of unsynced items) will be cleared.



1.14 Support

The Support screen provides details of how to contact the Anord Mardix software support team in the event of any problems using the app.



Tapping on either the phone number or **Call Now** on this screen will automatically call the main Anord Mardix office number.



1.15 Troubleshooting

Some of the more common problems encountered when using the Engineer App, together with some suggested solutions.

Problem	Error Code/Message	Possible Solution
Installation and updating		
Installation page showing older version than expected		Clear Safari cache: http://www.imore.com/how-clear-stored-website-data-ios-7-safari
Registration and logging in		
Unable to register	No registration data was found for your credentials	Confirm username and password are correct Ensure app has been updated to the latest version Check wi-fi signal

Problem	Error Code/Message	Possible Solution
		<p>Ensure device is not in airplane mode</p> <p>Go to Settings and select Restore Defaults</p>
Forgotten PIN		Re-register username on app
General issues		
App crashes		<p>Close any other background apps</p> <p>Turn device off then on again to clear memory</p>
Syncing		
Sync fails	<p>0x0001001C</p> <p>The network connection is unavailable</p>	<p>Check wi-fi signal</p> <p>Ensure device is not in airplane mode</p> <p>Go to Settings and select Restore Defaults</p>
Sync fails	<p>0x00010026</p> <p>The server did not recognise the request</p>	<p>Ensure app has been updated to the latest version</p> <p>Check wi-fi signal</p> <p>Ensure device is not in airplane mode</p> <p>Go to Settings and select Restore Defaults</p>
Sync fails	<p>0x00010027</p> <p>The server is not currently available</p>	<p>Check wi-fi signal</p> <p>Ensure device is not in airplane mode</p> <p>Go to Settings and select Restore Defaults</p>

Problem	Error Code/Message	Possible Solution
Sync fails	0x00010028 The server reported an error	Ensure app has been updated to the latest version Check wi-fi signal Ensure device is not in airplane mode Go to Settings and select Restore Defaults
Sync fails	0x00010008 There was a problem syncing one of the items	If any of the above error codes are also displayed, refer to the relevant solution above <i>Otherwise</i> note any other error codes and contact Mardix software support
Searching		
Counts showing 0 on Search screen		Run full download sync
Scanning		
Service tag not found	No equipment data was found	Ensure valid Mardix service tag is being scanned Run full download sync
Test Certificates		
Error when creating	0x00010013 There was a problem sending the test session information to the server	Ensure app has been updated to the latest version Check wi-fi signal Ensure device is not in airplane mode Go to Settings and select Restore Defaults

Problem	Error Code/Message	Possible Solution
Unable to activate	You do not currently have authorisation to activate this test session	Test session has been set up for another tester, log in as correct tester <i>Or</i> create new test session
Error when activating	0x00010014 There was a problem retrieving the updated test session information from the server	Ensure app has been updated to the latest version Check wi-fi signal Ensure device is not in airplane mode Go to Settings and select Restore Defaults
Error when activating	0x0001001A Test session has already been activated on another device	Test session has already been activated by another engineer
Error when abandoning	0x0001001B Test session has been modified on another device, unable to abandon	Test session has already been activated by another engineer

2 Release Notes

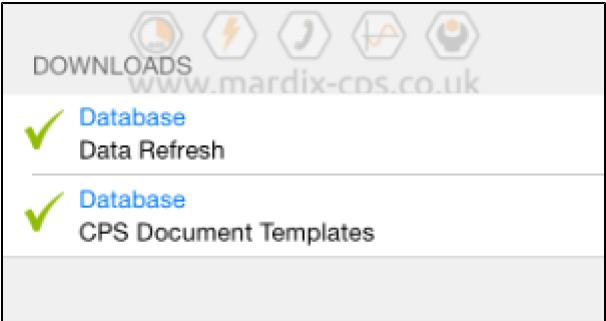
2.1 v4.1.0

The main changes in v4.1.0 of the Engineer App are as follows.

2.1.1 Sync

The sync download has been further optimised, meaning that a full download sync over a good wireless connection should complete in less than 4 minutes.

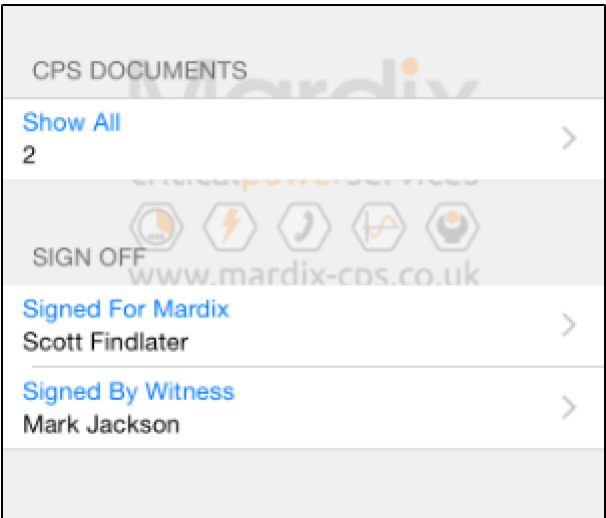
In addition, there is now an additional sync item '**CPS Document Templates**'.



2.1.2 Site Visit Reports

Site visit reports now require the engineer to sign off the SVR, before the witness sign-off is enabled.

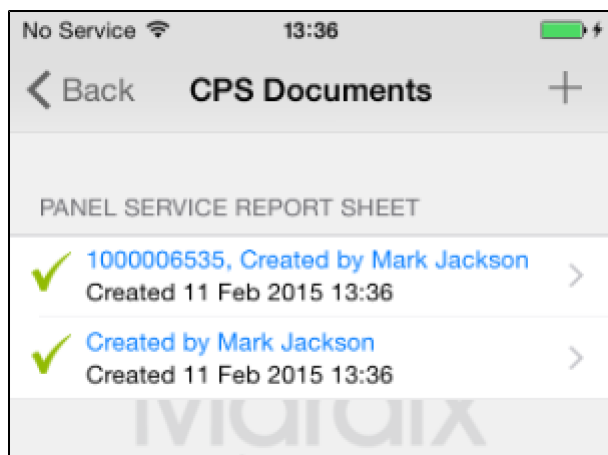
Also, site visit reports now have an additional section '**CPS Documents**'.



Please note that training and instruction will be provided on all the following new functionality as appropriate, and that these screenshots are currently **for information purposes only**.

2.1.3 CPS Documents

The new CPS Documents section allows service documents (such as Panel Service Report Sheet, Device Service Test Certificate etc) to be added and modified to the site visit report. Existing CPS documents are listed, and new ones can be added by tapping the '+' button.



This then provides a menu allowing documents to be added quickly and easily. The document type, number of documents (either equipment-specific or blank), and which equipment items documents should be created for, are all selectable. Tapping **Done** then adds the selected document(s) to the site visit report.

No Service

13:37

Cancel

Add CPS Documents

Done

DOCUMENT TYPE

Thermal Imaging Report

NUMBER OF COPIES

Equipment Copies

2

Blank Copies

0

ASSOCIATED EQUIPMENT ITEM

1000006535 Mardix K1/HQ

LV Switchboard - Main LV Switchboard

Paint Shop - South, Ground Floor

Home

Sync

Scan

Scan History

Settings

Tapping on any document will bring it up on screen, and allow it to be edited, in exactly the same way as the existing test department documents; this includes the editing of text fields by using the text box inputs. Once modified, documents are synced up to the server in the usual way.

Note that documents are only added to the upload sync **when they have been edited for the first time**, so adding a document then doing with it means it will not be sent up to the server.

< CPS Documents

Mardix

Panel Service Report Sheet

Date of Works:

11 Feb 2015

EMI Number:

Panel Location:

Paint Shop - South

Panel Ref:

Main LV Switchboard

Serial Number:

21847001/1

Service Tag Number:

1000006535

Engineers:

Mark Jackson

Phase Colours:

☐ L1: Red L2: Yellow L3: Blue N: Black

☐ L1: Brown L2: Black L3: Grey N: Blue

Live Check

L1 (A)

L2 (A)

L3 (A)

N (A)

Main Meter Readings

L1 - N (V)

L2 - N (V)

L3 - N (V)

Power Factor

L1 - L2 (V)

L1 - L3 (V)

L2 - L3 (V)

Total (kW)

Total (kVA)

Total (kVAr)

Total (kWh)

Home

Sync

Scan

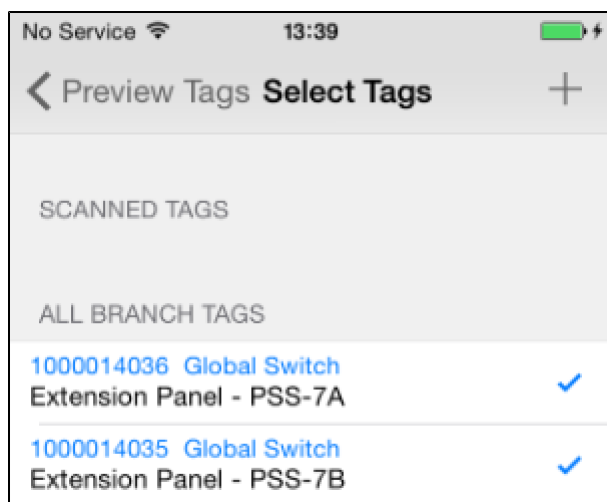
Scan History

Settings

2.1.4 Creating Equipment Items

New equipment items can now be created from the site visit report **Select Tags** screen. This is accessed by tapping on the new '+' button at the top right of this screen.

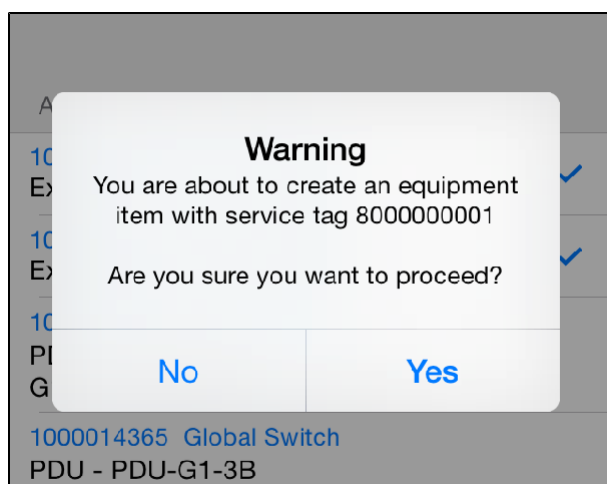
Note that this option is only available for sites that have a current service contract.



Tapping the + button will bring up a scan window, in which you can then scan a Mardix service tag in order to create the equipment item for it in the system. Once this has been done, you will need to complete the equipment details - this is exactly the same as the existing equipment details screen, but with the following required fields:

- Serial number
- Equipment Type
- Commissioned Status
- Manufacturer

Note that equipment items can only be created by scanning a valid unallocated service tag.



2.1.5 Required Fields

Most forms on the app now have placeholders to highlight which fields are required to be completed before the record can be saved. The following screenshots show examples of these for the equipment and site visit report screens.

SERVICE TAG INFO	
Service Tag Number	8000000001
Serial Number	Required Field >
ORIGINAL WORKS ORDER INFO	
Works Order	18776

SITE VISIT REPORT DETAILS	
Branch Address	Mardix K1/HQ, Westmorland Business Park, Kendal
Visit Type	Required Field >
Visit From	Required Field >
Visit To	Required Field >
Scope Of Works	Required Field >
Work Completed	>

2.2 v4.1.3

The main changes in v4.1.3 of the Engineer App are as follows.

2.2.1 CPS Documents

Adding CPS documents

CPS documents can now only be added to a site visit report after the site visit report has been saved.

Creating CPS documents against equipment

CPS documents can now **only** be created against an equipment item; the only scenario in which a blank copy can be created is when the site has no service contract.

The screenshot shows a form titled "Service Service Test Certificate". It has three main sections: "NUMBER OF COPIES", "ASSOCIATED EQUIPMENT ITEM", and a list of equipment items. Annotations point to specific fields:

- "Number of copies per equipment item" points to the "NUMBER OF COPIES" field, which has a value of 2 and a "Change number of copies" button.
- "Number of blank copies" points to the "Blank Copies" field, which has a value of 0 and a "Change number of copies" button.
- "Service tags currently associated with site visit report" points to the "ASSOCIATED EQUIPMENT ITEM" field, which has a dropdown menu showing "LV Switchboard - Main LV Switchboard" and "LV Switchboard - Backup LV Switchboard".
- "Select equipment items to create documents for" points to the list of equipment items, which includes "LV Switchboard - Main LV Switchboard", "LV Switchboard - Backup LV Switchboard", and "Opposite main board, Yard, Ground Floor".

Associating equipment with SVRs

To select an equipment item on the CPS documents screen, it must firstly be associated with the SVR.

On the SVR screen, tap **Associated Equipment** to bring up the Preview Tags screen. Then, on the Preview Tags screen, tap **+** at the top right of the screen to bring up the Select Tags screen (show below).

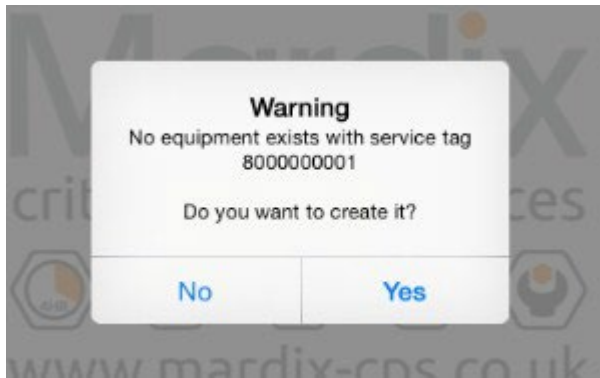
The screenshot shows the "Select Tags" screen. It has a header "Preview Tags" and a "Select Tags" button. Below the header are two lists: "SCANNED TAGS" and "ALL BRANCH TAGS". Annotations point to specific elements:

- "Add new associated equipment item" points to the "+" button at the top right of the screen.
- "All scanned tags for the associated branch" points to the "SCANNED TAGS" list, which includes "LV Switchboard - Main LV Switchboard" and "Paint Shop - South, Ground Floor".
- "All tags for the associated branch" points to the "ALL BRANCH TAGS" list, which includes "LV Switchboard - Backup LV Switchboard", "Opposite main board, Yard, Ground Floor", and "LV Switchboard - Main LV Switchboard".
- "Service tags currently associated" points to the "ALL BRANCH TAGS" list.

On the Select Tags screen, you can either associate a tag by

- tapping on **+** at the top right of the screen to scan it
- ticking it in one of the lists displayed

If you scan in a tag that does not exist (e.g. if you are tagging a new piece of equipment), you will be prompted to add the tag.



You will then need to complete the following fields, after which you can create documents against the equipment item.

- Serial Number
- Equipment Type
- Commissioned Status
- Manufacturer

2.3 v4.2.0

2.3.1 Search

Searching For SVRs

The SVR search now no longer loads all results to start with, meaning this page now loads much faster.



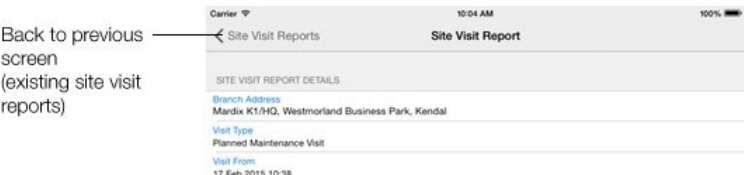
When selecting a filter on the SVR search, the filter can now be cleared using the **Clear** button.



2.3.2 Editing Site Visit Reports, Equipment and Components

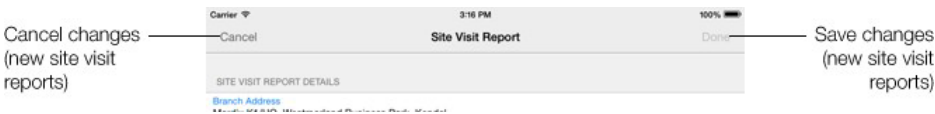
Existing Items

When editing an existing SVR, equipment item or component, any changes you make are now saved instantly as you go, and you no longer have to remember to tap **Done** to save any changes.



New Items

The only exception to this is when you are creating a new SVR or tagging a new piece of equipment, in which case you do need to tap **Done** to save the record initially. Any further changes after this are then auto-saved as above. Note also that for SVRs, photos and CPS documents can now only be added after the site visit report has been saved.



2.3.3 CPS And Test Documents

Editing Text Fields

When editing a text field in a CPS or test document, if a second text field is selected, the original 'floating text box' is now dismissed. This is to correct a bug where two text fields could previously be accidentally selected at the same time.

4. Labels

a. Voltage warning per inner door / cover

☐

b. Circuit / IO device references

☐

c. Mardix Service Tag & peel off sticker

☐

d. Designation marking

☐

e. Interface terminal ID markers

☐

f. Fuse & relay ID markers

☐

5. Phase indication

a. Input & output terminals

☐

b. Main busbars per unit section

☐

c. STS & transformer cable ID tags

☐

6. Degree of protection

a. External (in accordance with GA drawing)

☐

b. Internal (IP20)

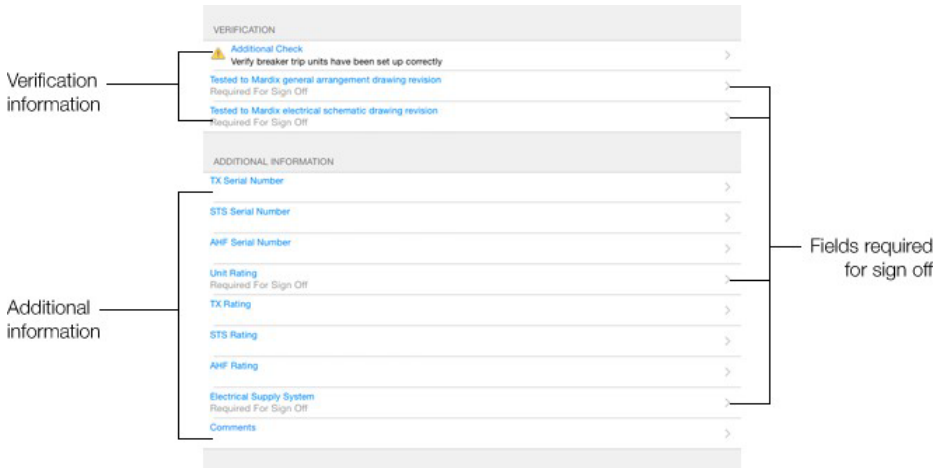
☐

Comments

2.3.4 Test Sessions

Required Fields

Any fields on a test session that are required for sign off (other than the tests themselves or the breaker trip unit verification) are now indicated using placeholder text.

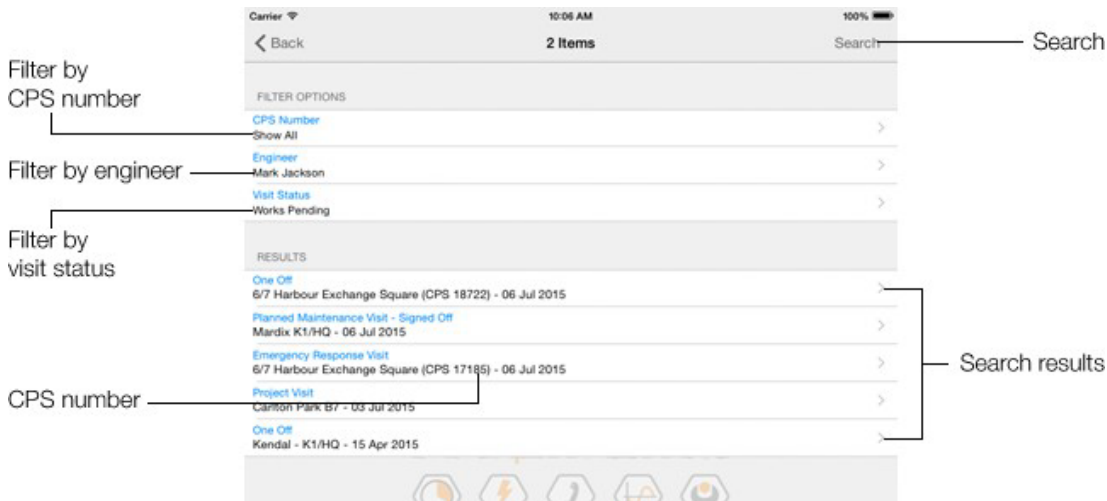


2.4 v4.3.0

2.4.1 Search

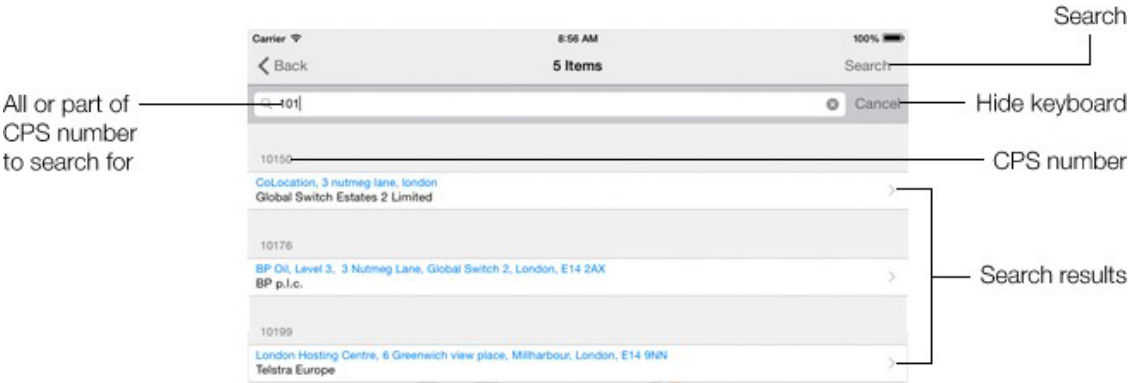
Searching For SVRs

You can now search for **SVRs** on **CPS Number**, as well as **Engineer** and **Visit Status**.



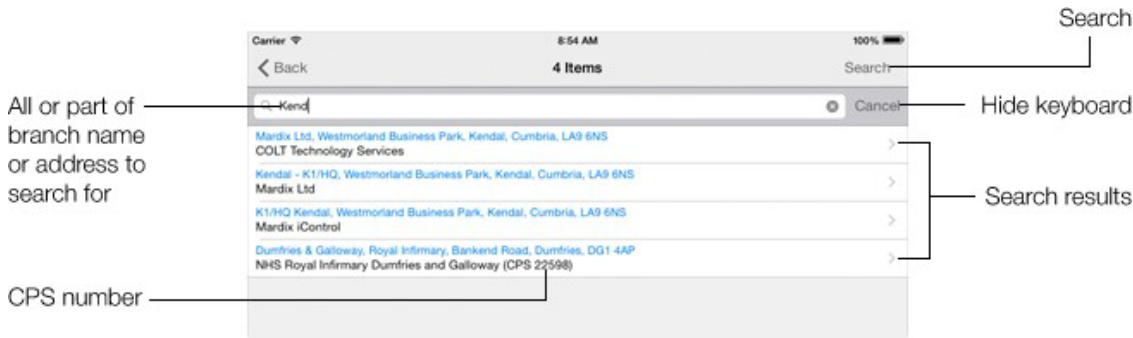
Searching For Service Contracts

There is also a new search category of **Service Contract**, allowing you to search for a branch by CPS number.



Searching For Branches

The normal **Branch** search results now display a branch's associated CPS number(s).

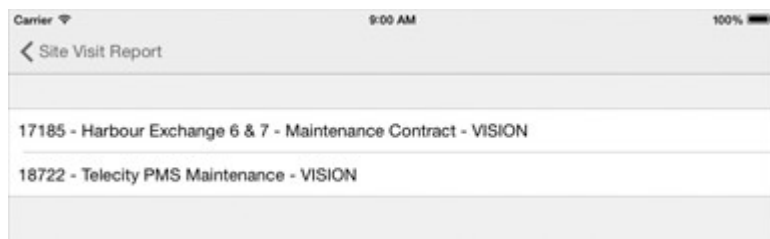


2.4.2 Site Visit Reports

When creating or editing a site visit report, there is a new field of **CPS Number** for the SVR.

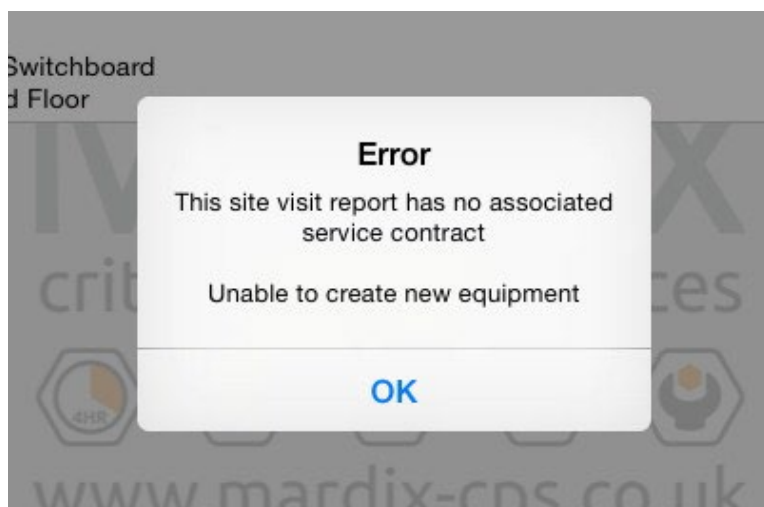
SITE VISIT REPORT DETAILS	
Branch Address	Mardix K1/HQ, Westmorland Business Park, Kendal
CPS Number	18722
Visit Type	Planned Maintenance Visit

When selecting a CPS number for a site visit report, you will only be able to select a CPS number which is associated with the SVR's branch.



2.4.3 Tagging Equipment

Before tagging new equipment, ensure that the SVR has a CPS number, otherwise you will receive this error message.



When creating a new CPS document, the SVR's CPS number will now be automatically added to the **EM Number/Contract Ref** field of the document.

EM Number:	18776
Panel Ref:	Main LV Switchboard
Service Tag Number:	1000006535

2.5 v4.4.0

2.5.1 CPS Documents

Modified Documents

Documents that have been downloaded/created, and then modified, are now highlighted with an orange tick instead of a green one.



2.5.2 Test Sessions

Additional Documents

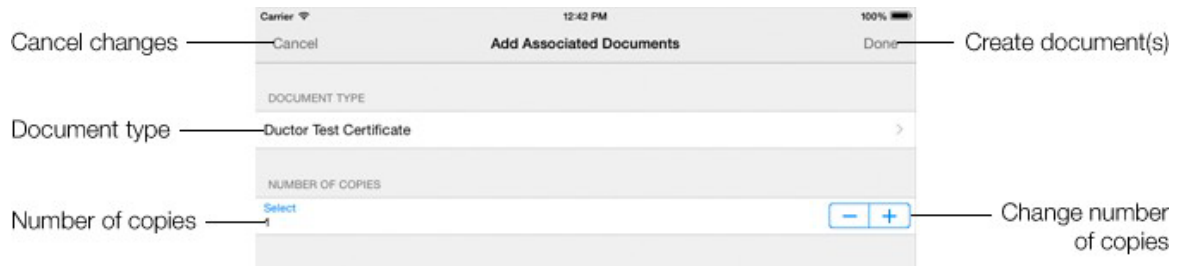
Additional documents can now be added to a test session. The documents currently available are **Ductor Test Certificate**, **Schneider Electric Breaker Test Certificate** and **Torque Test Certificate**.



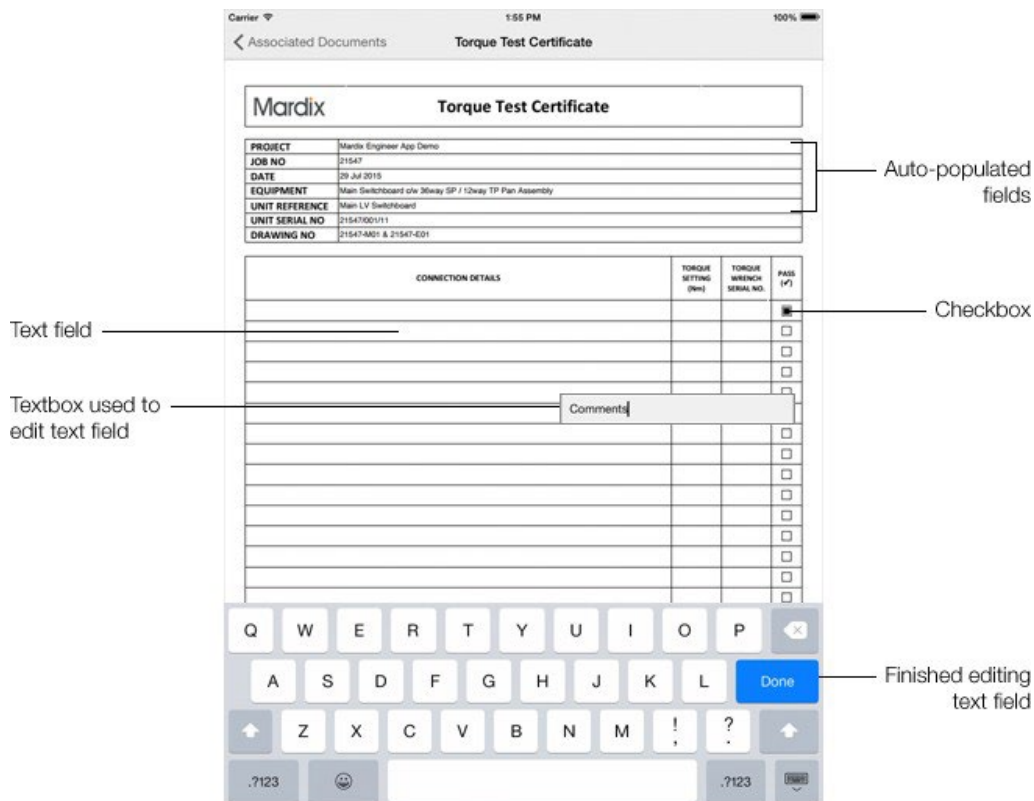
Documents appear exactly the same as for site visit report CPS documents. Modified documents are displayed with an orange tick.



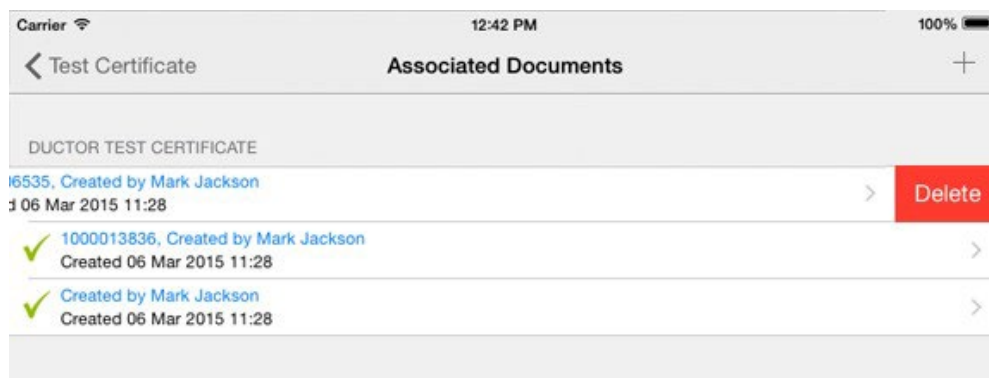
Documents can be added by tapping the '+' button. As tests are always performed against either a piece of equipment or a component, these documents are associated with the same piece of equipment or component by default.



Additional documents are modified in exactly the same way test documents. Any modified documents are synced up to the server and saved on the network as part of the final combined test certificate.



Documents can also be deleted in the same way as CPS documents, by swiping the table cell from right to left to reveal a hidden Delete button.



2.6 v4.5.0

2.6.1 Test Sessions

IBAR Tests

For **IBAR Tests** and **IBAR Tap Off Box Tests** only, upon tapping **Activate Test Session** you will be required to scan a location tag, which should be present at all testing stations. Once you have scanned a valid location tag, activation will proceed as normal.



2.6.2 Site Visit Reports

Sign Off

When all required information is complete on a site visit report, any required signatures will now display **Signature Required** in red text; firstly the Mardix signatory, then when this has been entered, the witness signatory.

SIGN OFF	
Signed For Mardix Mark Jackson	>
Signed By Witness Signature Required	>

2.7 v4.6.0

2.7.1 Test Sessions





There are now two new test session types available, **Ductor Test** and **Schneider CB Secondary Injection Test**.

Tap Off Box Test
Ductor Test
Schneider CB Secondary Injection Test
IBAR Test

For both of these new types of test session, additional test documents can be added to a test session by using the **Add Test** button. A new **Location** field is also required, to specify whether the test is being performed at the **Factory** or on **Site**.

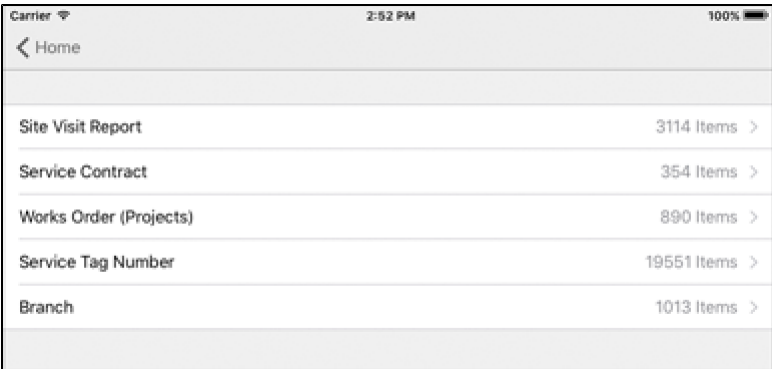
TESTS	
 Test	>
Ductor test	
 Test	>
Ductor test	
 Add	
Test	
ADDITIONAL INFORMATION	
Location	>
Site	

For Schneider CB Secondary Injection Tests, the test documents are distinguished by the value entered in the **Circuit Breaker** box.

TESTS	
 Test	>
Schneider CB secondary injection test	
Circuit Breaker Reference: A01	
 Test	>
Schneider CB secondary injection test	
Circuit Breaker Reference: A02	
 Test	>
Schneider CB secondary injection test	
Circuit Breaker Reference: B01	
 Add	
Test	

2.7.2 Search

The search menu has now been reordered.



2.7.3 Site Visit Reports

For site visit reports for branches with a service contract, **CPS Number** is now a required field.

Branch Address	ISS Facility Services LTD, Interagted Solutions, 1 Genesis Business Park, Albert Drive, Woking, GU21 5RW
CPS Number	Required Field
Visit Type	Planned Maintenance Visit

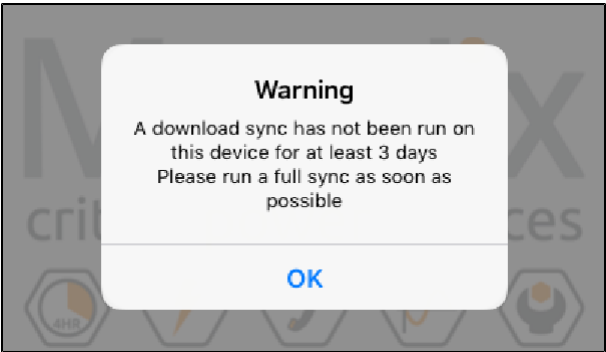
2.7.4 Scan History

A new option on the **Settings** screen allows you to **Preserve Scan History During Sync**, which if set means that the scan history is not cleared following a full download sync.

On	<input checked="" type="checkbox"/>
Preserve Scan History During Sync	<input checked="" type="checkbox"/>
Yes	<input checked="" type="checkbox"/>

2.7.5 Sync Warning

If a full download sync has not been run for 3 days, you will now receive a warning at startup.

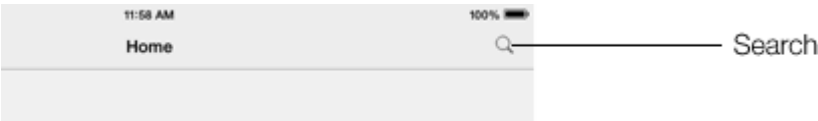


2.8 v4.7.0

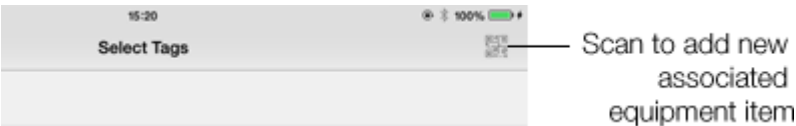
2.8.1 System Icons

The following icons have now been added or modified:

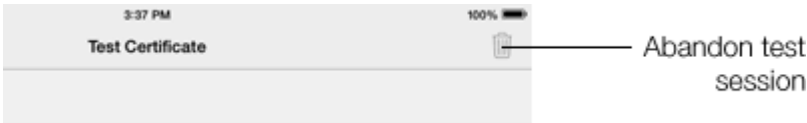
The navigation bar Search button has now been replaced with a search icon.



The navigation bar '+' icon on the SVR Associated Equipment screen (used to bring up the scan window to scan service tags) has now been replaced with a scan icon.



The navigation bar Abandon button for test certificates has now been replaced with a trash icon.



2.8.2 Site Visit Reports

When creating CPS service sheets, multiple document types can now be selected, and created simultaneously.



If a site visit report still has a status of 'Works Pending', this is now displayed in grey text to remind engineers that the field needs to be changed before the SVR can be signed off.

Required For Sign Off >

Engineer >
Mark Jackson

Site Visit Status >
Works Pending

ASSOCIATED EQUIPMENT

Service Tags >
1000010200

2.8.3 Service/Test Documents

If the keyboard obscures the bottom of the document, the document can now be scrolled upwards to view the hidden textbox.

Transformer Connections ☐ YES ☐ NO ☐ NA Panel Cleaned ☐ YES ☐ NO ☐ NA

All switches & MCB disconnections correctly positioned as per start of works ☐ YES ☐ NO ☐ NA

Post Work Checks All shrouds/covers replaced and all doors closed & locked ☐ YES ☐ NO ☐ NA

Witnessed by Engineer: ☐ YES ☐ NA Witnessed by Client: ☐ YES ☐ NA

Issues Noted & Comments:

Scrollbar

Q W E R T Y U I O P

2.8.4 Test Sessions

The Site Live Test now also includes the insulation resistance and high voltage di-electric tests. Note that any of the 3 new tests can be set as 'N/A' if not required.

Test Sessions Test Certificate

TESTS

Test 4 Insulation resistance test >

Test 5 High voltage di-electric test >

Test 6 Insulation resistance test (within 10 min of test 5) >

Test 7 Phase rotation test >

Test 8 Functional mechanical/electrical operation >

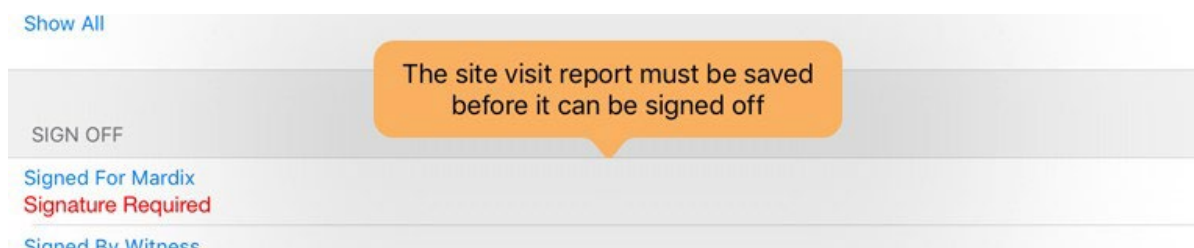
Test 9 Functional test of BMS interface >

Test 10 Functional test of intelligent system >

2.9 v4.8.0

2.9.1 Site Visit Reports

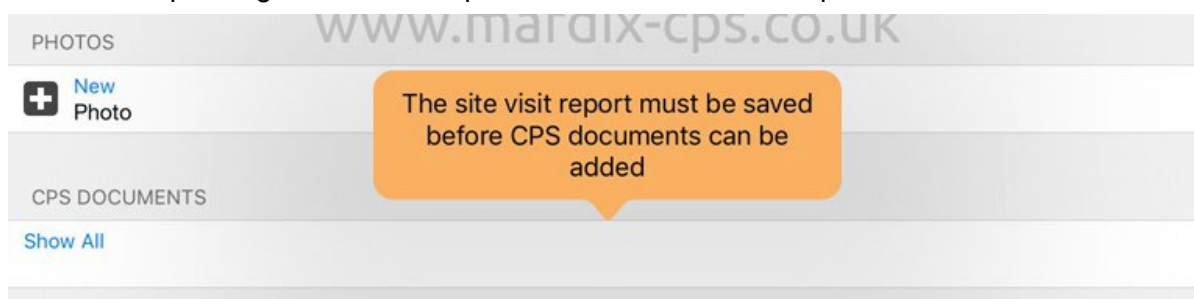
New site visit reports that have been created on the device, must now be saved first using the **Done** button before they can be signed off.



2.9.2 Site Visit Reports and Test Sessions

Tooltips are now displayed in site visit reports and test sessions to provide hints when editing, for things such as

- attempt to access restricted fields before saving
- attempt to sign off before required fields have been completed



2.9.3 Equipment and Component Details

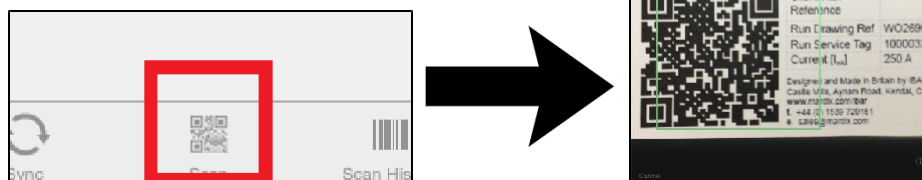
When editing equipment or components, the unit description can now be modified.



2.9.4 Databar Installations

During Databar installations, components can now be added to runs using the app. To assign a component to a run...

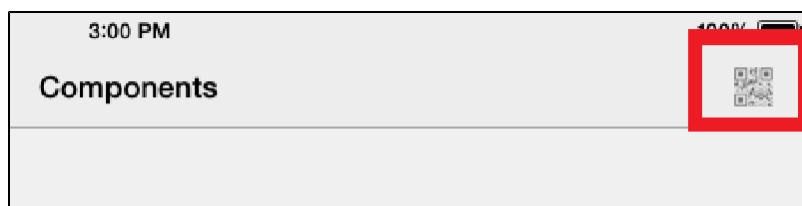
- Scan the run's service tag to bring up the Equipment Details screen for the run



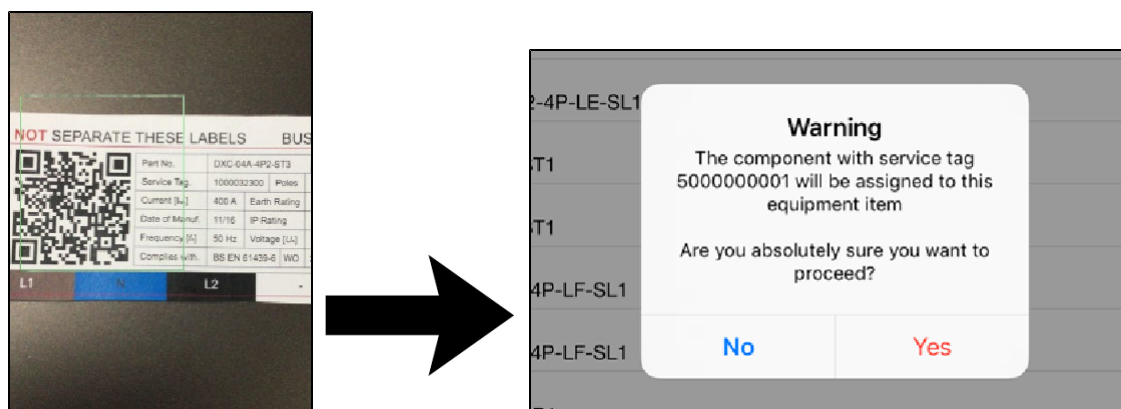
- Tap on **Serviceable Components** to bring up the Components screen



- Tap the scan icon at the top right of the screen to bring up the scan window



- Scan the service tag of the Databar component you want to assign to the run, then tap **Yes** to confirm



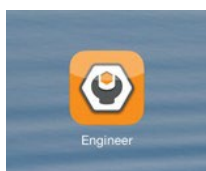
3 iOS Engineer App Quick Start Guide

3.1 Launching and Logging In

The iPad mini power button is at the top (press and hold to turn on/off, or press to bring out of sleep mode) and the home button is at the bottom on the front.



The engineer app icon will either be docked at the bottom, or displayed on the desktop - tap it to launch the app.



After launching the app, you should see your username displayed. Tap to log in, then enter your PIN number.





m.jackson@mardix.co.uk	>
Register New User	>

Please confirm your PIN			
●	●	●	

3.2 Navigation

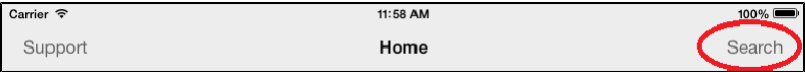
The main menus are always at the top and bottom of the screen - the links at the bottom always stay the same, the ones at the top will change depending on which screen you are on.

Carrier	11:58 AM	100%
Support	Home	Search

 Home	 Sync	 Scan	 Scan History	 Settings
---	---	---	---	---

3.3 Finding a Site Visit Report

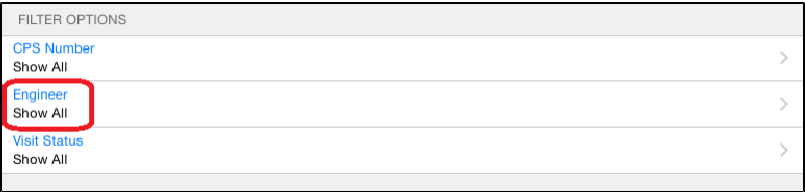
To find an existing site visit report, make sure you are on the home screen (you can tap the **Home** link at the bottom twice to make sure) then tap **Search** at the top right.



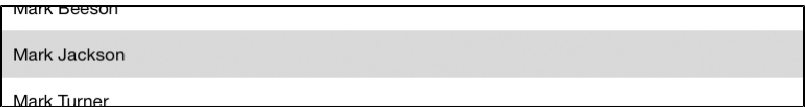
Select **Site Visit Report**.



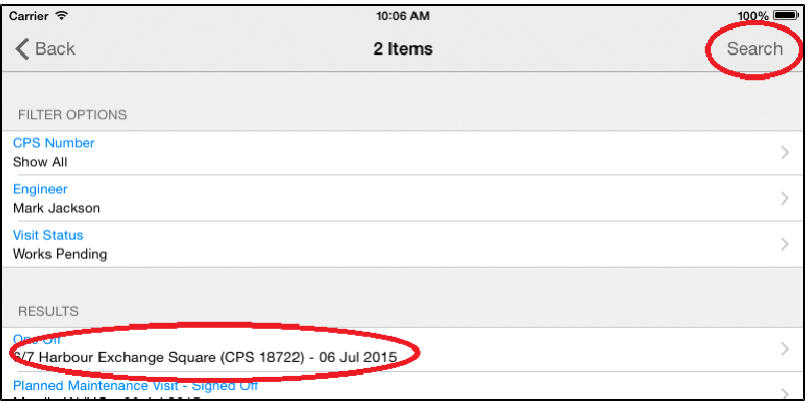
Select **Engineer**.



Select your name in the list (it should have already scrolled down to it).



Now tap **Search** at the top right...a list of your site visit reports will appear, with the newest one at the top. Tap on the SVR to select it.



3.4 Filling in a Site Visit Report

IMPORTANT - Ensure that you complete all the fields on the SVR - in particular ensure **CPS Number** (if possible), **Visit To**, **Works Completed** and **Jobs Outstanding** are filled in otherwise you will not be able to sign off the SVR . You will also need to ensure that **Site Visit Status** is changed to something other than 'Works Pending',

A screenshot of the 'Site Visit Report' form. The form has a header bar with 'Cancel', 'Site Visit Report', and 'Done' buttons. Below the header, several fields are listed, each with a blue link to edit it. The following fields are circled in red: 'CPS Number' (with value 10150), 'Visit To' (with value 03 Mar 2015 16:17), 'Scope Of Works' (with value Routine maintenance), 'Work Completed' (with value All required work complete), 'Jobs Outstanding' (with value None), and 'Site Visit Status' (with value Completed Works (as method statement)).

When editing **Works Completed** and **Jobs Outstanding**, the **Copy Scope Of Works** button will paste in the original scope of works text.

A screenshot of the 'Site Visit Report' form. The 'Copy Scope Of Works' button is circled in red. The button is located at the top right of the form, next to the 'Site Visit Report' title.

You can add photos to a site visit report by using the **New Photo** option.

A screenshot of the 'PHOTOS' section of the 'Site Visit Report' form. It shows a list of photos with a 'New Photo' button at the bottom. The 'New Photo' button is circled in red.


3.4.1 If You Need To Add Equipment...

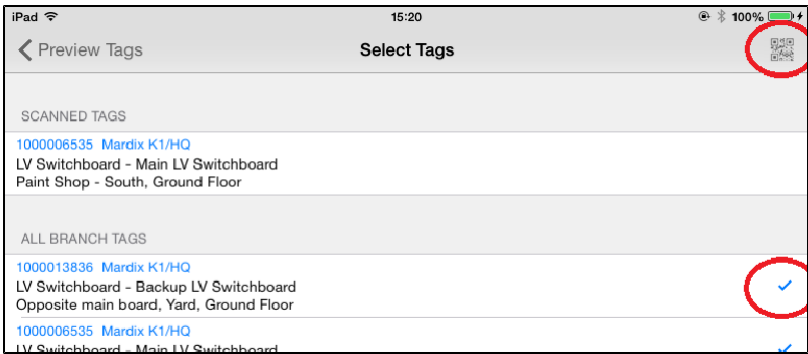
You only need to do this if one of the pieces of equipment you are servicing is not listed under Associated Equipment. Tap on **Service Tags** to bring up the list of associated tags.


A screenshot of the 'ASSOCIATED EQUIPMENT' section of the 'Site Visit Report' form. It shows a list of equipment with a 'Service Tags' button at the bottom. The 'Service Tags' button is circled in red.

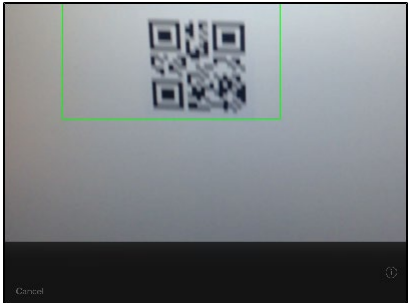
Tap **+** at the top right.



If the equipment item is listed, you can either select it in the list; or tap the  icon at the top right then scan the service tag QR code.



If the equipment item is **not** listed, then you will need to tag it (at this point you may actually need to add a service tag sticker onto it); tap the  icon at the top right then scan the service tag QR code.



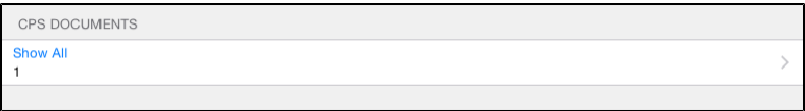
You then need to fill in the **Serial Number**, **Equipment Type**, **Commissioned Status** and **Manufacturer**, then tap **Done**.



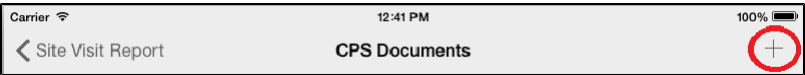
3.5 Adding Service Documents

Panel service report sheets and other documents can only be added against equipment items, so make sure you have followed the previous step if the equipment item isn't listed against the SVR.

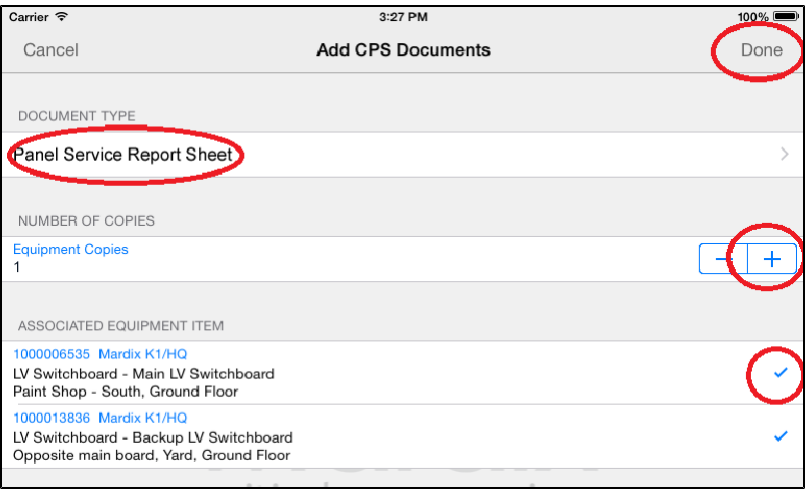
Tap on the **CPS Documents** option. You might get a warning at this point saying it cannot connect to the server; **this is normal, so don't worry if that happens** and just proceed as below.



To add a new document, tap **+** at the top right.



Select the **Document Type**, the **number of copies** to create **for each selected equipment item** (this will almost always just be '1'), and then tick the **equipment items** you want to create the sheets for. Tap **Done** to create the documents.



Documents are listed, with green ticks meaning they have been created but not yet edited; orange ticks meaning they have been modified.

Tap on a document to open it.

Carrier 12:41 PM 100%

< Site Visit Report GPS Documents +

PANEL SERVICE REPORT SHEET

- ✓ 1000006535, Created by Mark Jackson
Created 29 Jul 2015 12:40 >
- ✓ 1000006535, Created by Mark Jackson
Created 29 Jul 2015 12:40 >
- ✓ Created by Mark Jackson
Created 29 Jul 2015 12:40 >

Checkboxes can be edited by tapping on them. For text fields, tap in the text field, enter text in the box that pops up, then press **Done** to commit the text.

To save changes, tap < **CPS Documents** at the top left.

The fields at the top should be pre-populated, but double-check they are correct. Ignore the sign-off fields at the bottom.

Carrier 3:27 PM 100%

< CPS Documents

Mardix criticalpowerservices

Panel Service Report Sheet Check these fields

Date of Works:	03 Mar 2015	EM Number:	18776	
Panel Location:	Paint Shop - South	Panel Ref:	Main L2 Switchboard	
Serial Number:	21547001/11	Service Tag Number:	1000006535	
Engineers:	Mark Jackson			
Phase Colours:	<input checked="" type="checkbox"/> L1: Red L2: Yellow L3: Blue N: Black <input type="checkbox"/> L1: Brown L2: Black L3: Grey N: Blue			
Live Check Main Meter Readings Text field	L1 (A)	L2 (A)	L3 (A)	N (A)
	L1 - N (V)	L2 - N (V)	L3 - N (V)	Power Factor
	L1 - L2 (V)	L1 - L3 (V)	L2 - L3 (V)	
	Total (kW)	Total (kVA)	Total (kVAr)	Total (kWh)

3.6 Signing Off The Site Visit Report

Once all the fields on the site visit report have been completed, the **Signed For Mardix** option should have an arrow next to it, and will display **Signature Required** in red text. Tap on this, then select your name from the list.

SIGN OFF

Signed For Mardix >

Signature Required

Signed By Witness

Draw your signature on the signature pad, then tap **Confirm**. If you need to clear the signature, press and hold on the signature pad.

SIGNATORY

m.jackson@mardix.co.uk
Mark Jackson

Site Visit Status
Completed Works (as method statement)

X

Confirm

Signed By Witness should now have an arrow displayed, and again will display **Signature Required** in red text. Tap on this to select a client signatory.

SIGN OFF

Signed For Mardix
Mark Jackson >

Signed By Witness
Signature Required >

Select the signatory name, then ask them to sign off as above.

Carrier 3:30 PM 100%

< Site Visit Report +

Chris Connors

Mark Jackson

3.6.1 If The Signatory Is Not Listed...

You can add the signatory if they are not listed; tap **+** at the top right to bring up the New Signatory form. Complete all the fields then tap **Done**.

Carrier 3:30 PM 100%

Cancel New Signatory Done

Title
Required Field >

Forename
Required Field >

Surname
>

Once both yourself and the engineer have signed off the site visit report, the two signatories will now be displayed.

Note that the site visit report is now locked and no further changes can be made.

SIGN OFF

Signed For Mardix

Mark Jackson

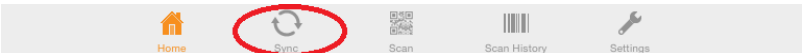
Signed By Witness

Test Signatory

3.7 Syncing

Once you are in wifi range, you will need to sync up your work.

Tap **Sync** at the bottom of the screen.



Select **Upload Only** then tap the **Sync** button.

Note that before travelling to site, you should always go to this screen, select **Upload & Download**, and then tap **Sync** to run a full data refresh.

Carrier 12:07 PM 100%

Sync

Upload Only

Upload & Download

Sync

UPLOADS

Equipment

1

Equipment Documents

0

3.7.1 If You Get Prompted To Log In...

When syncing, you may occasionally get prompted to log in. If this happens, enter your username and password and tap **Register**.

Username

m.jackson@mardix.co.uk

Password

••••••••

Register

Then enter and confirm your PIN number.

Please confirm your PIN

•

•

•