Tekla EPM Go 2019

View and manage information remotely in Tekla EPM Go

April 2019

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1 View and manage information remotely in Tekla EPM Go

Tekla EPM Go is a web application that allows users to access Tekla EPM information remotely using a mobile device. By using Tekla EPM Go, you can access status information, drawing files, and inventory information virtually anywhere, as long as there is an internet connection and the Tekla EPM Remote Server is running.

In Tekla EPM Go, you can:

- View and manage production control job information, such as drawing files, inspection test records, cut lists, and shipping information.
- View materials items and receive them into the inventory.
- Move items within the inventory.
- Add labor time to a production control job.
- Add, modify, and delete general inspection test records.

For more information, see the following links:

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1.1 Install Tekla EPM Go

To install Tekla EPM Go, see the following requirements and instructions.

The information needed to set up a Tekla EPM Go website

he Tekla EPM support sets up a web server for your company. To have a Tekla EPM Go website set up, you need to provide the Tekla EPM support with the following information:

- The legal name of your company
- The existing domains or websites of your company
- Your company logo (preferably as a vector graphic)
- The address of your company as you want it to appear on the Tekla EPM Go website
- The company phone number as you want it to appear on the Tekla EPM Go website
- The company fax number or email address as you want it to appear on the Tekla EPM Go website
- The preferred company website
- A connection to your database (a static IP address, an A record, or a DDNS)
- The port that will be used for accessing the database.

  The default port is 9154.
- The phone number and email address of a contact person for setting up Tekla EPM Go and scheduling an eventual training.

Install the Tekla EPM Remote Server

The Tekla EPM Remote Server service listens for and responds to traffic from the web server component of Tekla EPM Go.

The Tekla EPM Remote Server is normally installed when you install the Tekla EPM desktop application, because it is also used for running automated events. You can also install the Tekla EPM Remote Server separately, if necessary.

The Tekla EPM Remote Server is typically installed on the Tekla EPM server computer. On whichever computer the Tekla EPM Remote Server is installed, a TCP port needs to be forwarded to that computer.

To install the install the Tekla EPM Remote Server, do the following:

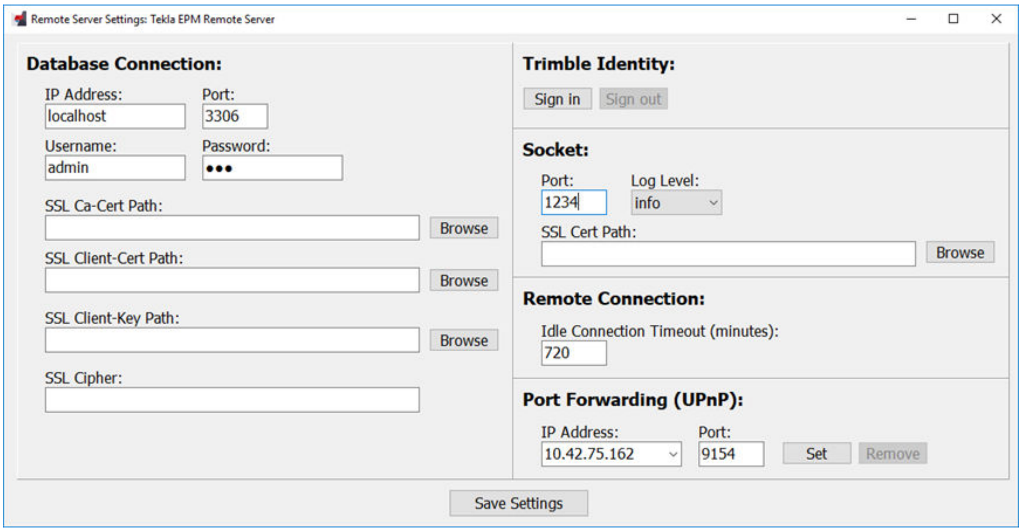
1. Go to `C:\Users\Public\Documents\Tekla\Tekla EPM\Backup`.
2. Double-click the `TeklaEPMRemoteServerSetup.exe` file to install the Tekla EPM Remote Server.
3. Use the default options for the installation.

The **Tekla EPM Remote Monitor** window opens automatically after the installation is finished. The **Tekla EPM Remote Monitor** window is where you can manage the Tekla EPM Remote Server settings.

Next, define the remote server settings.

Modify the remote server settings and start the Tekla EPM Remote Server

1. In the **Tekla EPM Remote Monitor** window, click **Settings** to see the IP address and port for the database connection.

   You do not need to type a username or password.

2. In the upper-right section of the window, click **Sign in** and sign in with a Trimble Identity that has access to all Trimble Connect projects of your company.

   If the Trimble Identity cannot access all Trimble Connect projects, the status information of Trimble Connect projects cannot be synced.

   If you do not sign in with a Trimble Identity, the Tekla EPM Remote Server will fail to start because it does not have the necessary license information.

3. If a TCP port othen than the default port (9154) has been set up for forwarding, enter the port number in the **Port** field in the **Socket** section.

4. Save the settings.

   If the settings have been defined successfully, the Tekla EPM Remote Server should start running. You can see if the remote server in the **Tekla EPM Remote Monitor** dialog box.

For troubleshooting, see Tekla EPM Remote Server and Tekla EPM Remote Monitor Overview.

Connection options to your Tekla EPM database

To allow us to connect to your system or network, select one of the following options:

- A dynamic DNS, or DDNS.

  A dynamic DNS is a service that provides you with a domain name or web address that stores and points to the public IP address of your system. This is useful if the network where your Tekla EPM server resides does not have a static public IP address.

  A script is installed on your computer or server that updates the public IP address on a regular interval. This way, if the public IP address changes for any reason, the web address still always points to the correct public IP address.

  There are several free sites that provide this service. Your internet service provider or website hosting provider may also include this already in their services.

- An A record.

  If you manage your own website, you can create an A record or web address to which you can manually assign your IP address.

  If your public IP address changes, you need to manually change the A record to reflect the change in the IP address.

- A static IP address.

  Note that if you use a static IP address:

  - Your internet service provider may want to charge you additional fees.
  - Trimble is not responsible for the down time due to changes in your IP address and cannot guaratnee a response time to fix this issue.

If you want to improve the security and protection for the connection to your Tekla EPM database, you can restrict the connection to the port to the following IP addresses:

- 100.25.80.52
- 23.20.111.82
- 100.24.217.156

- 18.223.67.252
- 54.241.216.243

Do not set the restriction until we have initially tested the connection.

NOTE The management of your system firewalls is extremely important, and the system firewall settings are solely your responsibility. Trimble is not responsible for any changes to these systems and cannot change the system firewall settings for you.

Directing the connection to the server installation of Tekla EPM

Next, you need to direct the connection to your system or network router to the server installation of Tekla EPM. To do so, set up TCP port forwarding. For more information on port forwarding, see Setting up port forwarding.

The port 9154 is the default port that is used for TCP port forwarding, but you can select any port.

Note that it is helpful for the Tekla EPM support staff if you use the default port whenever you call for help. Though it is unusual, there could potentially be multiple layers within your system, and the port used would have to be forwarded all the way to the server installation.

If there is a firewall on the computer used for the Tekla EPM server installation, you may need to create an inbound rule allowing the TCP port connection. The Tekla EPM Remote Server needs to be running on the server installation computer simultaneously.

1.2 Sign in to Tekla EPM Go

To sign in to Tekla EPM Go, you can use either your Tekla EPM user name and password or your Trimble Identity to sign in.

In order to sign in to Tekla EPM Go, you need to:

- Be added to your company's users as a Tekla EPM user or an external Tekla EPM user.

  We recommend that any Tekla EPM Go users within your company are added as Tekla EPM users and not external users, because external Tekla EPM users cannot see or select the most commonly used options in the lists available in Tekla EPM Go.

- Have the **Allow Tekla EPM Login** option enabled by your administrator if you are an internal Tekla EPM user.

- Have at least the **Allow Remote Login** option enabled by your administrator. Any other remote permissions allow you to perform actions in Tekla EPM Go.

  Note that the **admin** user that is created in Tekla EPM by default cannot have any remote permissions enabled, so you cannot sign in to Tekla EPM Go with that username.

- Have a password with of at least three characters set in Tekla EPM. You cannot sign in to Tekla EPM Go with a blank password.

If you are not sure if you have all the correct permissions, contact your administrator.

1. On your device, open Tekla EPM Remote Monitor and ensure that you have the Tekla EPM Remote Server running.
2. Open a browser and go to the Tekla EPM Go site of your company.

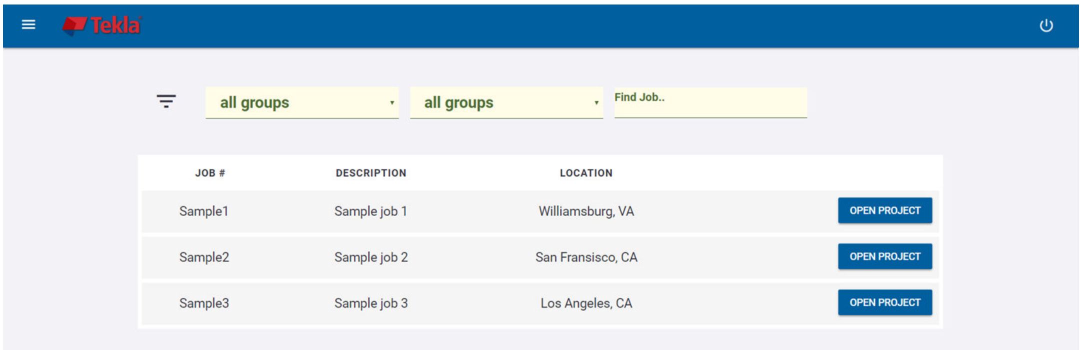
   The Tekla EPM Go sign-in page opens.

   You can save the Tekla EPM Go page of your company as a book mark.

   Do not save the Tekla EPM Go page as an application on your device. Saving Tekla EPM Go as an application would store the session ID. The session ID would expire the next time you sign in to Tekla EPM Go, and in consequence, the application would stop working.
3. Do any of the following:

To	Do this
Sign in with your Tekla EPM username and password	a. Type your Tekla EPM username and password in the available fields. b. Tap the **Log In** button.
Sign in with your Trimble Identity	Note that you need to have a Trimble Identity associated with your Tekla EPM user account in order to sign in with your Trimble Identity. For more information, see . a. Tap the **Trimble Identity Sign In** button. b. On the sign in page, type your email address and password in the available fields. c. If you want to stay signed in with your Trimble Identity, select the **Stay signed in** check box. d. Tap **Sign in**.

The home page of Tekla EPM Go opens. You can see all the production control jobs that you have a remote permission to access.



See also

View and manage production control job information (page 11)

View and manage inventory materials (page 38)

Add time tracking records (page 41)

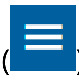
View and modify general inspection test records (page 43)

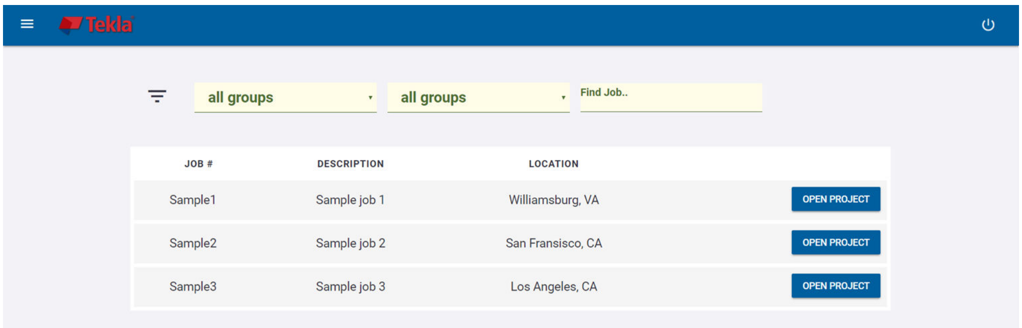
Sign out of Tekla EPM Go (page 46)

1.3 View and manage production control job information

When you log in to Tekla EPM Go, the homepage that opens shows the list of production control jobs whose information you can view and manage. To view and filter the projects, do the following:

1. Ensure that you are in the projects view.

   If you are not, tap the file menu icon (), and in the menu, select **Projects**.

2. To find the desired project, do any of the following:

- To filter the projects according to job groups set in the Tekla EPM desktop application, tap the arrows on the right side of the **all groups** lists, and select the primary and secondary job groups in the lists.

  The leftmost **all groups** list contains the primary job groups, whereas the rightmost **all groups** list contains the secondary job groups.

- To search for a job, type the job number in the **Find Job...** field.

3. To view and manage the project details, tap **Open Project**.

See also

Set and clear filters (page 12)

Find and view assemblies (page 15)

View drawings (page 16)

View sequences (page 17)

View inspection test records (page 18)

View cut lists and process items (page 21)

View item categories and sub-categories (page 24)

View the number of transmittals (page 26)

View the number of requests for information (page 26)

View the number of change orders (page 27)

View and modify production statuses (page 28)

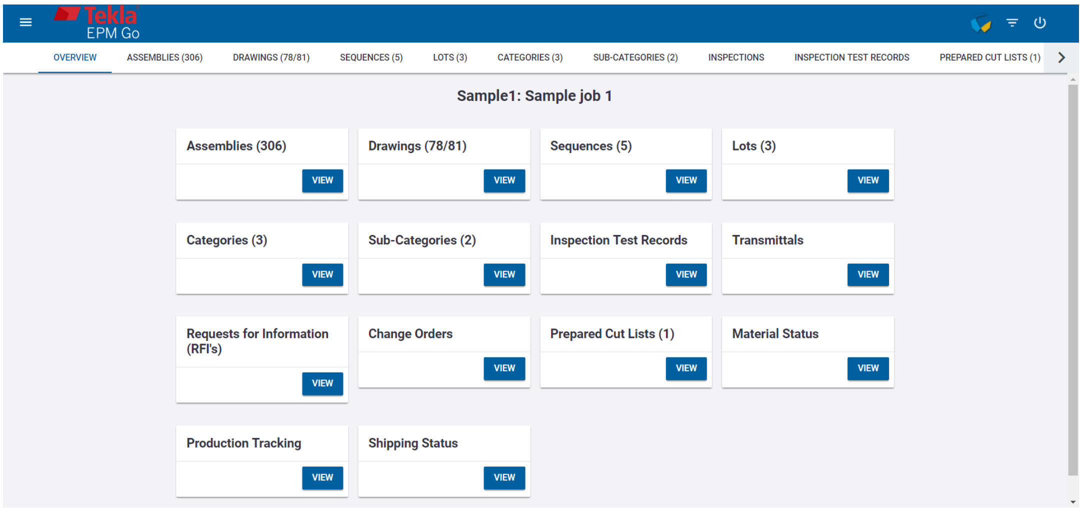
View and modify shipping information (page 32)

View the project schedule of a job (page 37)

Set and clear filters

When you are viewing a job, you can sort the information that is shown by applying filters. You can filter job information by main mark, drawing number, sequence, lot number, and item category or sub-category. You can also modify the applied filters, set multiple filters, and clear the filters to view all job information again.

Set filters



1. In the job view, tap the **Filter** ( ) button in the upper-right corner.

   Any currently applied filters are shown.

2. Tap the arrow on the right side of the **Select Filter** list, and select the filter that you want to apply.

3. In the list that appears, select the values that you want to use for filtering.

   For example, if you want to filter the job information according to the drawing number, select the desired drawing numbers.

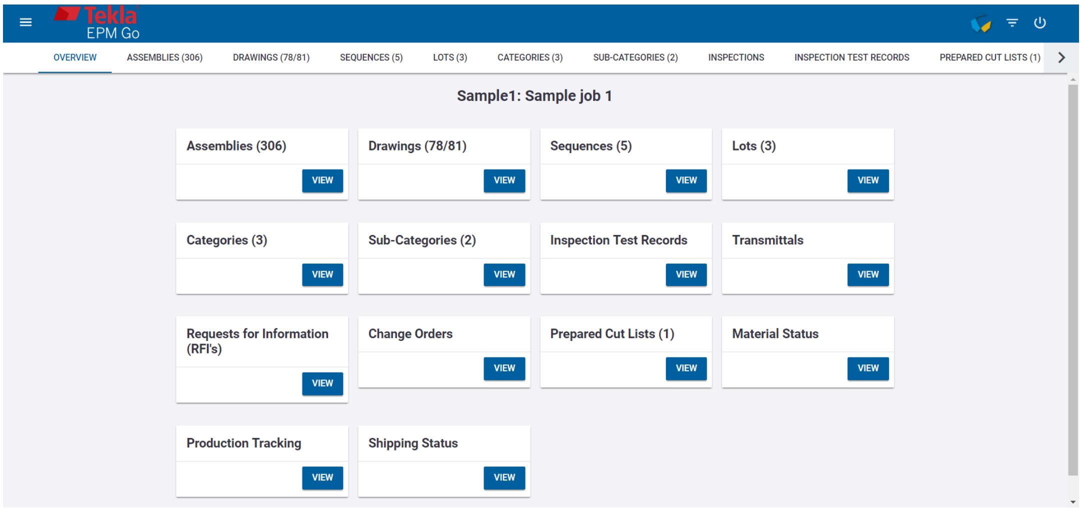
   You can select multiple values.

4. Tap **Apply Filters**.

   Only information that matches the filters that you applied is shown.

   To apply more filters, repeat steps 1 to 4.

Modify filters

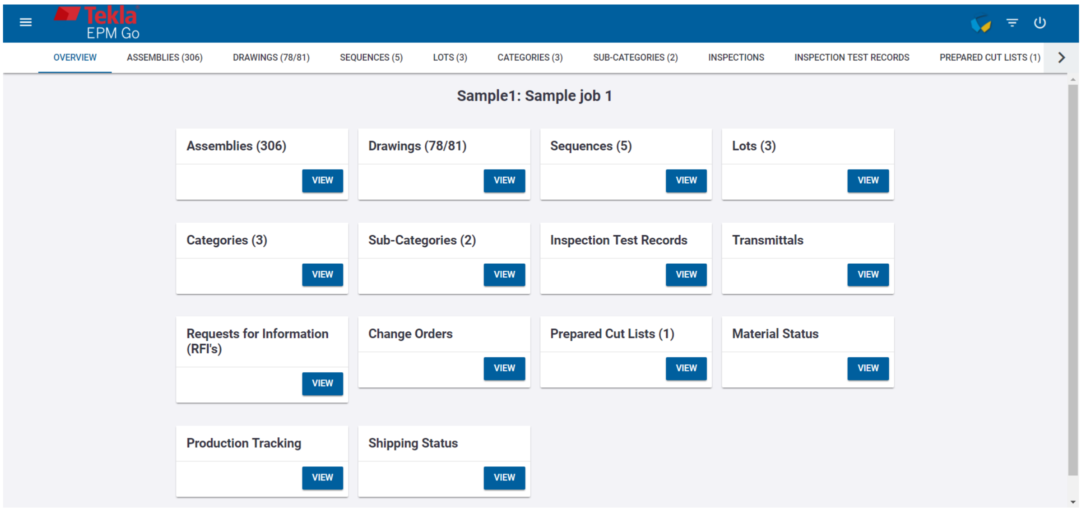


1. In the job view, tap the **Filter** ( ) button in the upper-right corner.

   The currently applied filters are shown.
2. Tap **Edit** under the filter that you want to modify.
3. Select or add new values that you want to use for filtering.
4. Tap **Apply Filters**.

   Only information that matches the filters that you applied is shown.

Clear filters



1. In the job view, tap the **Filter** ( ) button in the upper-right corner.

   The currently applied filters are shown.
2. Do one of the following:

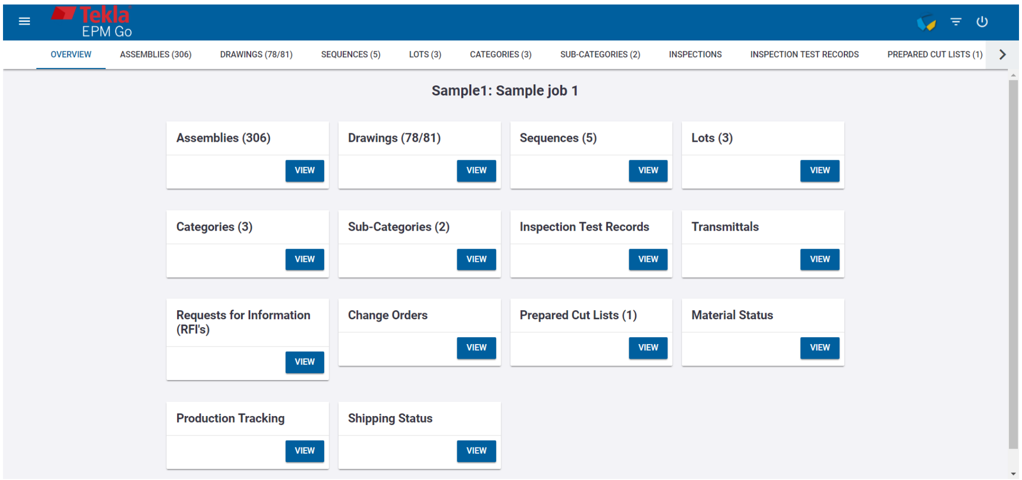
- To clear one filter, tap **Clear** under the filter that you want to clear.
- To clear all filters, tap **Remove Filters**.

Find and view assemblies

You can view assemblies, their properties, and the items within the assemblies in Tekla EPM Go. If the job has been linked to Trimble Connect and an IFC model has been attached to the Trimble Connect project, you can also view the assembly in the IFC model.

1. On the homepage, scroll to the job whose assemblies you want to view.
2. Tap **Open Project**.

   The job information view opens.



3. Do any of the following:
   - At the top of the page, tap **Assemblies**.
   - In the **Assemblies** section, tap **View**.

   The assemblies in the current job are shown.
4. To find the assembly that you want to view, do any of the following:
   - Scroll to find the assembly.
   - Type the main mark number in the **Find Assembly...** field.
   - Set a filter that only shows the desired assemblies.

     For more information on filters, see Set and clear filters (page 12).
5. To view the details of the assembly, do any of the following:
   - To view the properties of the assembly, tap the number in the **Main Mark** column.
   - To view the assembly and the items that belong to it, tap the  icon.

- To view the assembly in the attached IFC model using Trimble Connect, tap the icon.

  Note that if the job is not connected to a Trimble Connect project, the icon is not visible.
- View the number of inspection tests completed on assemblies in the **Inspection Test** column.

  If no inspection tests have been completed for the assemblies, the **Inspection Test** column is not visible.

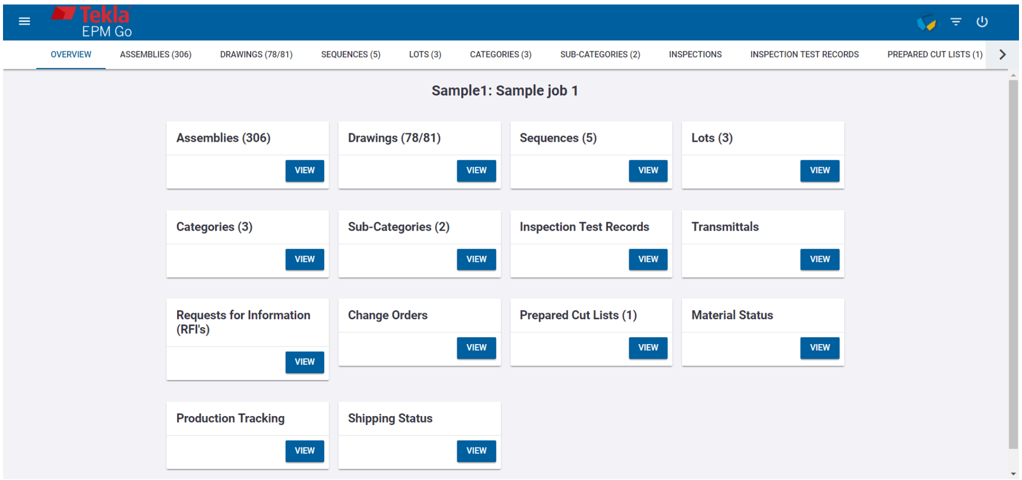
6. To view all assemblies again, tap the **Filter** icon () in the upper-right corner, and tap **Clear**.

View drawings

You can view the drawings added to a job in Tekla EPM Go. Note that you cannot add, modify, or delete drawings.

1. On the homepage, scroll to the job whose drawings you want to view.
2. Tap **Open Project**.

   The job information view opens.



3. Do any of the following:
   - At the top of the page, tap **Drawings**.
   - In the **Drawings** section, tap **View**.

   The drawings of the job are displayed.
4. To find the drawing that you want to view, do any of the following:
   - Scroll to find the drawing.

- Type the drawing number in the **Find Drawing...** field.
- Set a filter that only shows the desired drawings.

  For more information on filters, see Set and clear filters (page 12).

If a drawing file has been added for the drawing, you can see the file name it in the **File** column.

Note that the Tekla EPM Go site uses the settings defined on the Tekla EPM server to find the drawings in the **Drawing** default folder. If the default folder is not properly set or there are no drawing files, the **File** column is not visible.

5. In the **File** column, tap the drawing file to open it.

The drawing file is downloaded onto your device.

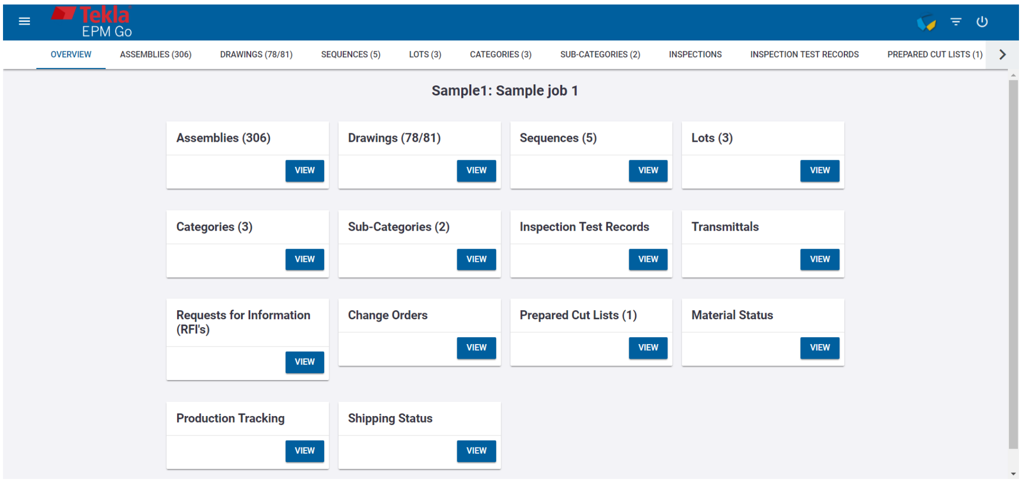
In order to view the drawing file, you need to have an appropriate application for opening drawing files on your device.

View sequences

You can view the list of sequences in a job in the Tekla EPM Go. The list shows the number of assemblies and items in the sequence, the weight of he sequence, and the number of inspected items in the sequence.

1. On the homepage, scroll to the job whose sequences you want to view.
2. Tap **Open Project**.

   The job information view opens.



NOTE If the job does not have multiple sequences applied to it, all material items within the job are considered a single sequence. In this case, the **Sequences** and **Lots** tabs and the **Sequences** and **Lots** sections are not visible in the job information view.

3. Do one of the following:
   - At the top of the page, tap **Sequences**.
   - In the **Sequences** section, tap **View**.

The sequences that match the currently set filters are displayed.

The **Sequence** column shows the name of the sequence. Clicking the button in the **Sequence** column sets the selected sequence as a filter for the job information. To modify the filters, see Set and clear filters (page 12).

The **Assy Qty** column shows the number of assemblies in the sequence.

The **Total Qty** column shows the total number of items in the sequence.

The **Weight** column shows the total weight of the items in the sequence.

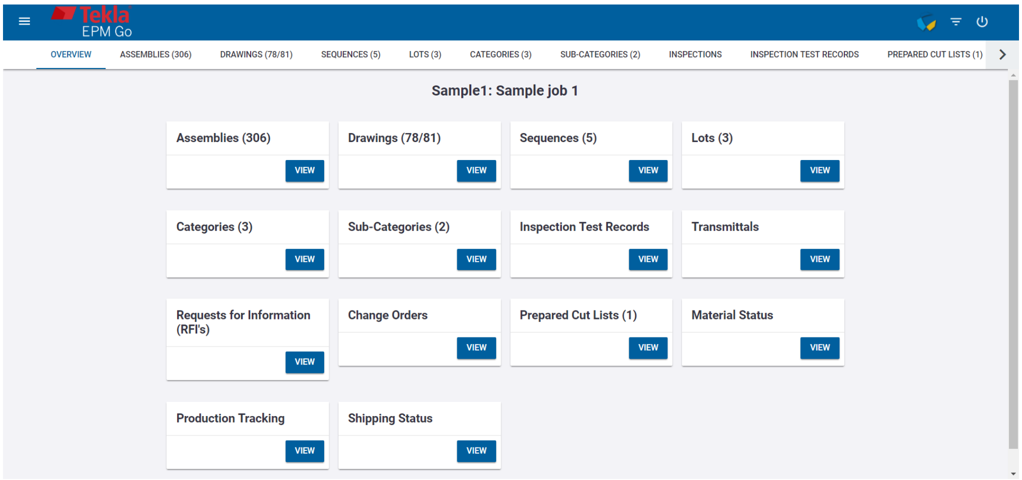
The different inspection columns shows the number of inspected items in the sequence.

View inspection test records

You can view the inspection test records added for a job in Tekla EPM Go. You can also view the details of the records and any PDF files attached to the records.

1. On the homepage, scroll to the job whose inspection test records you want to view.
2. Tap **Open Project**.

   The job information view opens.



3. Do one of the following:
   - At the top of the page, tap **Inspection Test Records**.
   - In the **Inspection Test Records** section, tap **View**.

A summary of the records for the completed inspection tests are shown.

The **Test Results** column shows the percentage of failed test records.

Note that only test records that match the currently set filters are shown. To modify the filters, see Set and clear filters (page 12).

4. To view individual records, scroll to find the desired test, and tap the magnifying glass () in the **View** column.

The individual inspection test records are shown. Do any of the following according to your needs:

- To show the values in the inspection test fields, click the **Show Field Details** button. To hide the field values again, click the **Hide Field Details** button.
- To view and modify the details of an individual record, create a report of the record, or delete the record, click the button in the **Rec #** column.
- If a PDF file has been attached to the record, you can view the file.

See also

Add job-specific inspection test records (page 0)

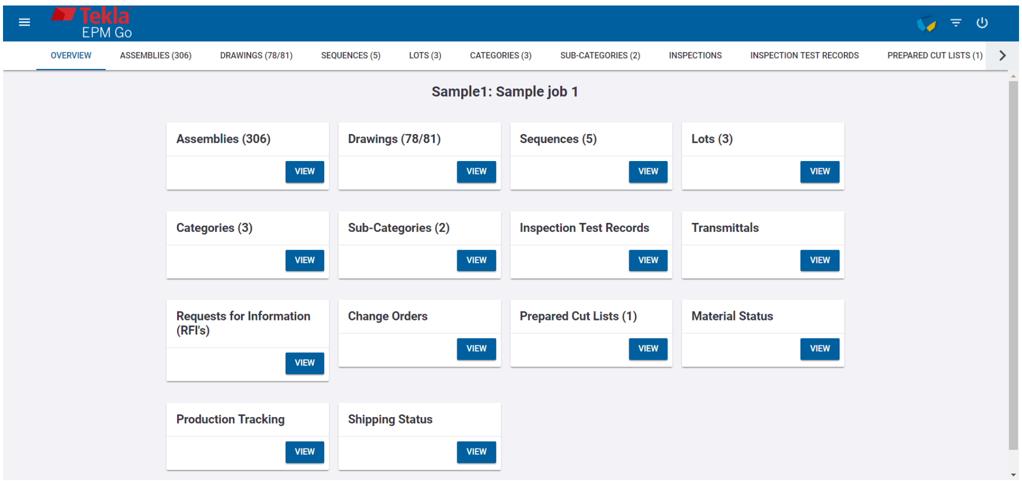
Add job-specific inspection test records

You can add inspection test records, or testing information for a job, in Tekla EPM Go. You can add records to the initial test, and attach re-test record PDF files or other record PDF files to the test records.

1. On the homepage, scroll to the job to which you want to add inspection records.

2. Tap **Open Project**.

   The job information view opens.



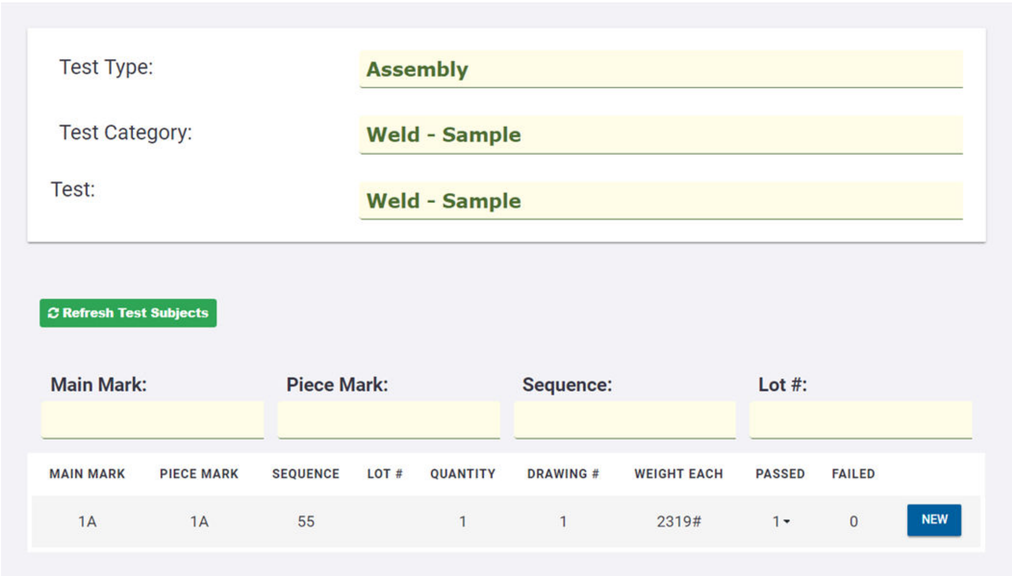
3. At the top of the page, tap **Inspections**.

4. Tap the available lists to select the test type, test category, and test that you want to run.

   The test types, categories, and test names need to be created in the Tekla EPM desktop application.

   Note that if you have not yet set a filter, you need to set one to proceed. For more information on setting filters, see Set and clear filters (page 12).

   After you have selected the test type, category, and test and set a filter, you can see the inspection test records in the current job that match the filter.



5. Do any of the following:

To	Do this
Add a new test record	a. Tap **New** on the right side of a test record. b. Tap the **Create as a follow-up to the failed test record #** list and select the **None, add as new test record** option.
Add a follow-up test record	Adding a follow-up test record allows you to change the test status from failed to passed without losing the original failed test record. a. Scroll to find a failed test record and tap the arrow in the **Failed** column. b. Tap the green record number. c. Tap the **Run Follow-up Test** at the bottom of the inspection test record view.

6. Tap the available lists to select the inspection location and inspector.

7. Define the test hours.
8. Add any other necessary information in the available fields.

   The available and mandatory fields are set in the inspection test properties in the Tekla EPM desktop application.
9. To attach a file to the record, do the following:
   a. Tap **Add File**.
   b. Browse to find the file that you want to attach and select it.
   c. Tap **Open**.
   d. Type a description for the file.

   To add more files, repeat steps a to d.
10. When you are ready to submit the record, tap **Submit Now** or **Submit**.
11. Tap **Confirm**.

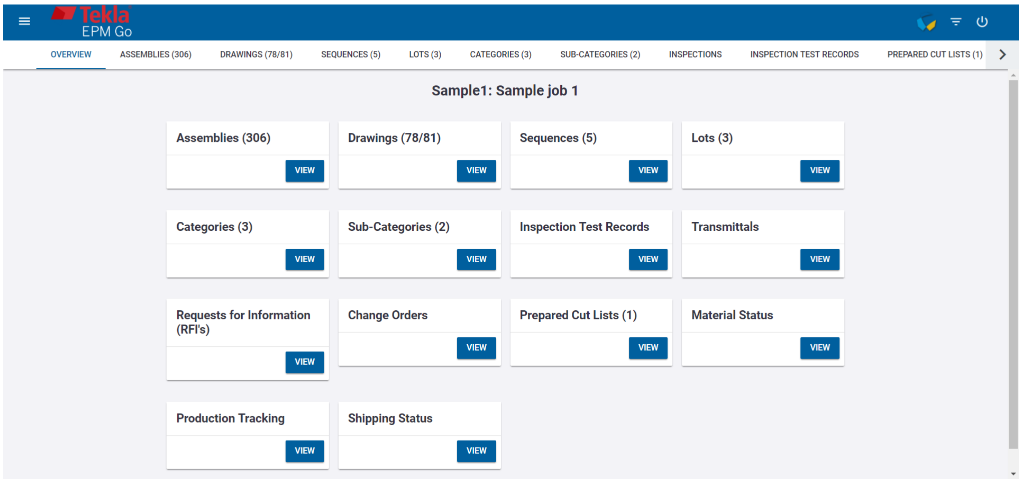
The inspection test record is added.

View cut lists and process items

In Tekla EPM Go, you can both view the cut lists saved for a job in Tekla EPM , and cut the items that have not yet been processed.

1. On the homepage, scroll to the job whose cut lists you want to view and modify.
2. Tap **Open Project**.

   The job information view opens.



3. Do any of the following:
   - At the top of the page, tap **Prepared Cut Lists**.
   - In the **Prepared Cut Lists** section, tap **View**.

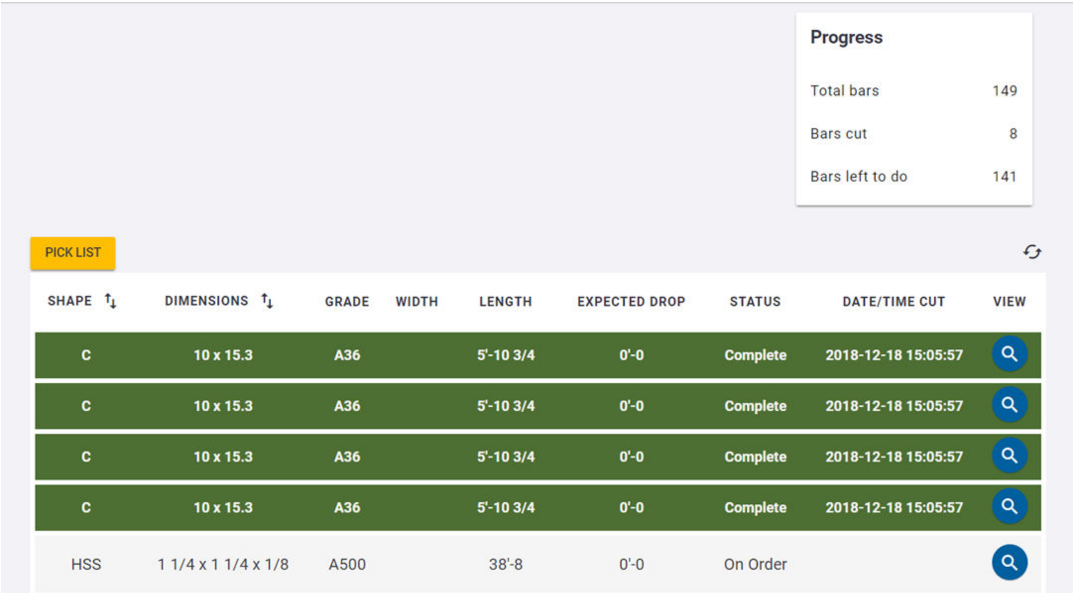
The cut lists that match the current filters are shown.

Note that only cut lists that have been saved for the current job in Tekla EPM desktop application are shown.

The **Invalidated** column shows the number of items whose cutting pattern has changed. Any items that have `0` in the **Invalidated** column can be cut.

If the desired cut lists are not shown, tap the **Filter** button () in the upper-right corner and set the filters so that you can see the desired items. For more information on filters, see Set and clear filters (page 12).

4. To view the details of a particular cut list, tap the cut list name in the **Title** column.



The cut list view opens, showing all the items in the cut list. The items on a green background have already been cut, whereas the items on a gray background have not yet been cut.

If necessary, you can view the list of material items that need to be cut by tapping **Pick List**.

If CNC files have been attached to cut list items, a **CNC Files** button is shown on the right side of the **Pick List** button. By clicking the **CNC Files** button, you can download a .zip package that contains all CNC files added for the items in the cut list.

Cut items

Note that items that are on order and have not yet been received cannot be cut.

1. In the **View** column of an uncut item, tap the button.
2. Tap the **Process** button.

   The details of the cut list are shown.
3. Modify the quantity of pieces to be cut, the drop length, and the inventory locations according to your needs.
4. If necessary, tap the **Drop must be reserved for project** list and select the job for which you want to reserve the drop material.

   Depending on the company standard settings set by your administrator, you might or might not be able to select another job in the **Drop must be reserved for project** list.
5. Tap **Cut it!**
6. To confirm cutting the item, tap **Confirm**.

When the item is cut, the background of the item turns green in the cut list view. The status and cutting date and time are updated.

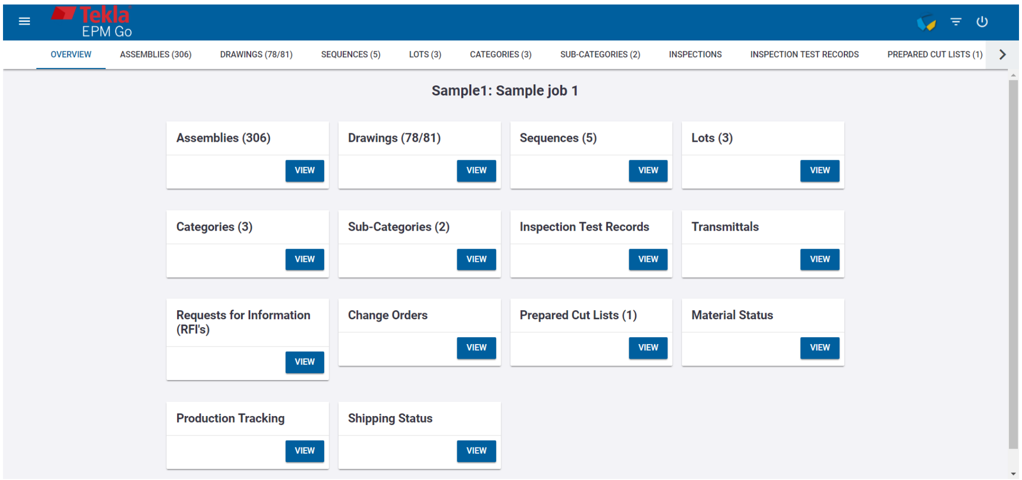
You can continue cutting other items according to your needs.

View material statuses

You can view the material statuses of items in Tekla EPM Go. You can also view further details about the items that have been taken from stock and cut.

1. On the homepage, scroll to the job whose material statuses you want to view.
2. Tap **Open Project**.

The job information view opens.



3. Do any of the following:
   - At the top of the page, tap **Material Status**.
   - In the **Material Status** section, tap **View**.

   The material statuses of items in the current job are shown.

   You can view the quantity and weight of items that are:
   - taken from stock
   - in stock
   - on a purchase order
   - on a requisition
   - not allocated (have not yet been sent to **Purchasing**)

   You can filter the material status information according to your needs. For more information, see Set and clear filters (page 12).
4. To view further details about materials that have been taken from stock and cut, tap the  button on the left side of **TFS**.

See also

View cut lists and process items (page 21)

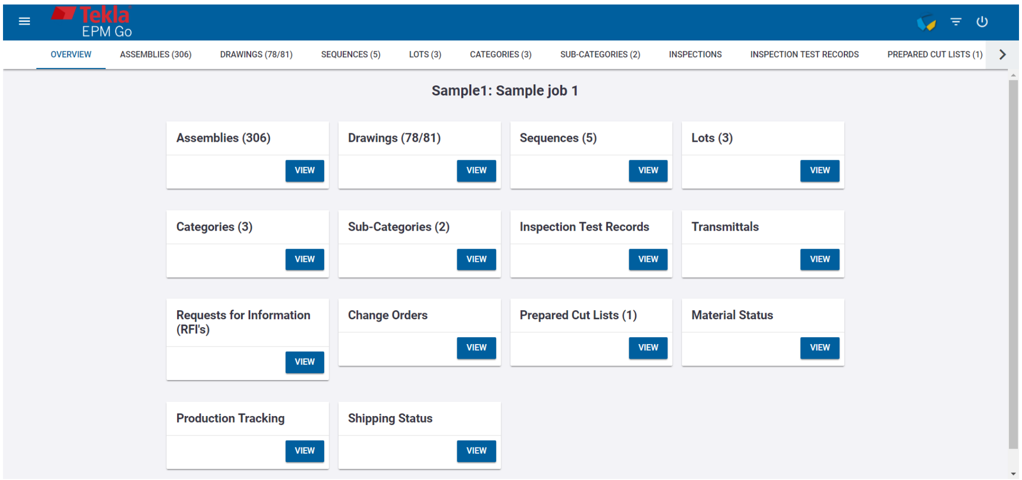
View item categories and sub-categories

You can view the categories and sub-categories of items in the job in Tekla EPM Go. Categories are keywords that you can use to sort items. For example, categories can be based on material types. Sub-categories are used to further sort the items within a category.

Note that to view the categories and sub-categories in a job, the job has to use categories and sub-categories.

1. On the homepage, scroll to the job whose categories or sub-categories you want to view.
2. Tap **Open Project**.

   The job information view opens.



NOTE If the job does not have multiple sequences applied to it, all material items within the job are considered a single sequence. In this case, the **Categories** and **Sub-Categories** tabs and the **Categories** and **Sub-Categories** sections are not visible in the job information view.

3. Do one of the following:
   - At the top of the page, tap **Categories** or **Sub-Categories**.
   - In the **Categories** box or the **Sub-Categories** box, tap **View**.

   The item categories or sub-categories in the job are displayed.

   The **Category** or **Sub-Category** column shows the name of the category or sub-category. Clicking the button in the **Category** or **Sub-Category** column sets the selected category or sub-category as a filter for the job information. To modify the filters, see Set and clear filters (page 12).

   The **Main Pc Quantity** column shows the number of main pieces in the category or sub-category.

   The **Total Qty** column shows the total number of items in the category or sub-category.

   The **Weight** column shows the total weight of the items in the category or sub-category.

4. To only view job information about the material items in a category or sub-category, tap the name of the desired category or sub-category.

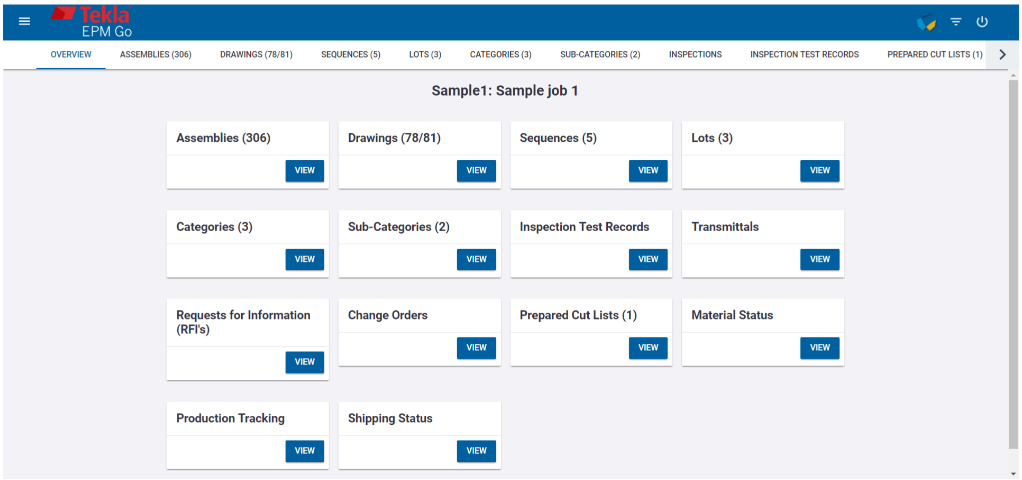
View the number of transmittals

You can view the total number of sent transmittals, as well as the number of outstanding and overdue transmittals, in Tekla EPM Go.

Note that you cannot view further details about the transmittals.

1. On the homepage, scroll to the job whose transmittals you want to view.
2. Tap **Open Project**.

   The job information view opens.

3. Do one of the following:
   - At the top of the page, tap **Transmittals**.
   - In the **Transmittals** box, tap**View**.

The total number of transmittals, the number of outstanding transmittals, and the number of overdue transmittals is shown.

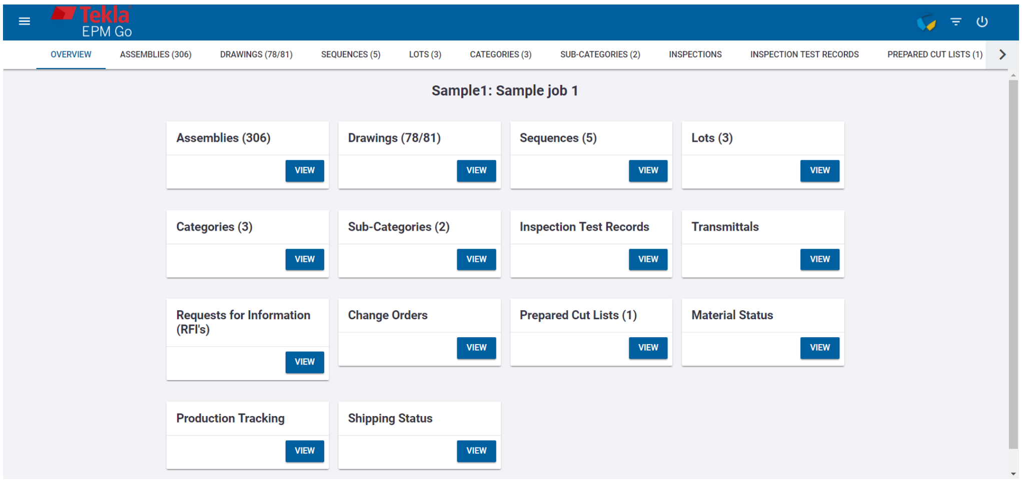
View the number of requests for information

You can view the total number of incoming and outgoing requests for information (RFIs), as well as the number of outstanding and overdue requests for information, in Tekla EPM Go.

Note that you cannot view further details about the requests.

1. On the homepage, scroll to the job whose requests for information you want to view.
2. Tap **Open Project**.

The job information view opens.



3. Do one of the following:
   - At the top of the page, tap **Requests for Information (RFI's)**.
   - In the **Requests for Information (RFI's)** box, tap **View**.

The total number of incoming and outgoing requests, the number of outstanding requests, and the number of overdue requests is shown.

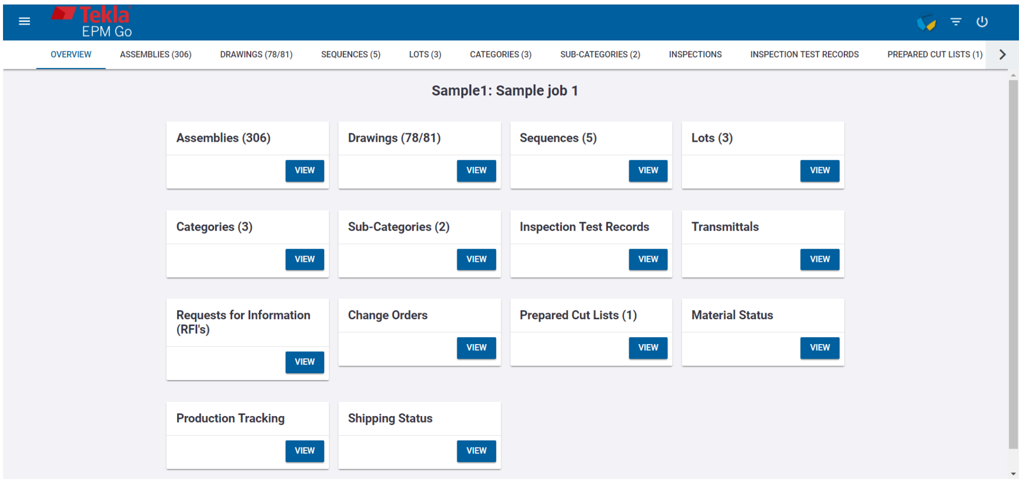
View the number of change orders

You can view the total number of change orders, as well as the number of outstanding and overdue change orders, in Tekla EPM Go.

Note that you cannot view further details about the change orders.

1. On the homepage, scroll to the job whose change orders you want to view.
2. Tap **Open Project**.

The job information view opens.



3. Do one of the following:
   - At the top of the page, tap **Change Orders**.
   - In the **Change Orders** box, tap **View**.

The total number of change orders, the number of outstanding change orders, and the number of overdue change orders is shown.

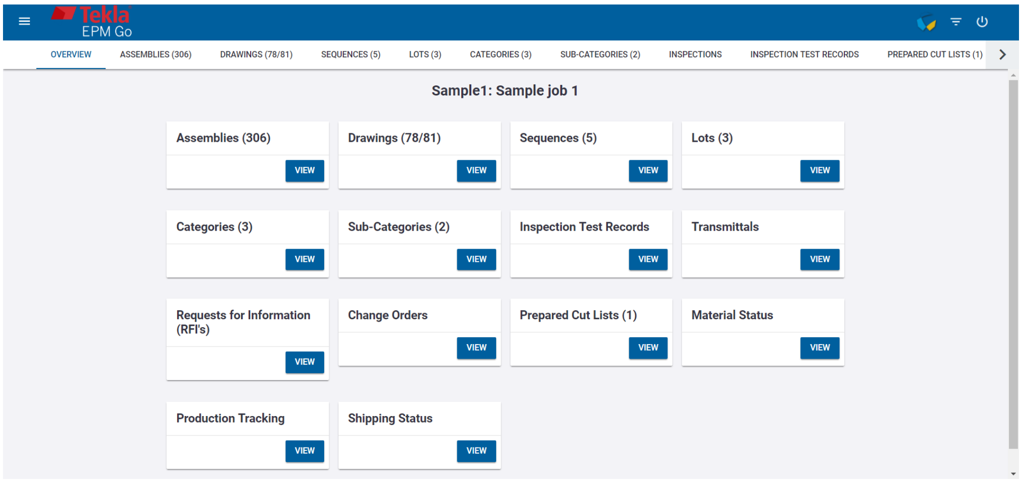
View and modify production statuses

You can view the production statuses of items in production control jobs in Tekla EPM Go. You can also add new production tracking records for material items in the selected production control job, or delete incorrectly added items from existing records.

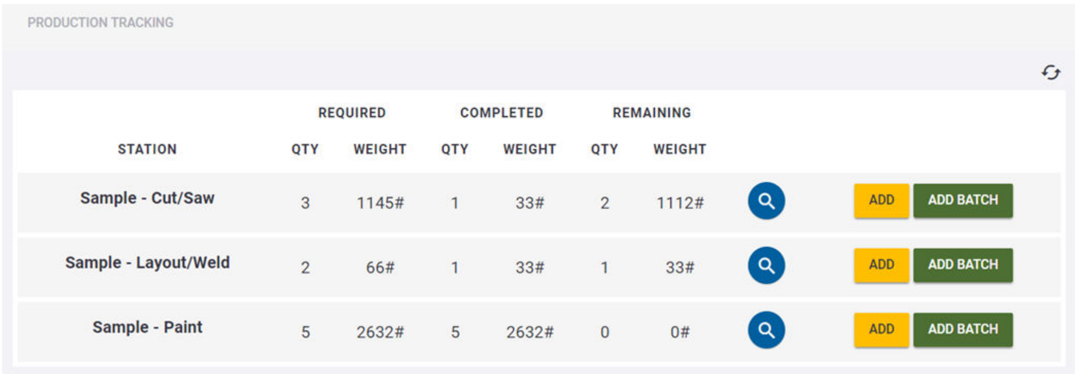
To view the production statuses, do the following:

1. On the homepage, scroll to the job whose production statuses you want to view or modify.
2. Tap **Open Project**.

The job information view opens.



3. Do any of the following:
   - At the top of the page, tap **Production Tracking**.
   - In the **Production Tracking** section, tap **View**.



The list of stations in the selected job is shown. You can view the total number and weight of items that are required to complete the station, that have already completed the station, and that are still remaining and have not yet completed the station.

If you want to view further details about a station, you can tap the  button on the right side of the station.

Add a single production tracking record

1. Tap the **Add** button on the right side of the station to which you want to add a record.
2. Tap the **Main Mark** list and either select or type the main mark of the items that have completed the selected station.

3. Type the quantity of pieces that have completed the selected station.

   The gray number in the **Qty** field shows the maximum number of items that can be processed.

4. If necessary, type the instance number in the available field.

   The gray number in the field shows the maximum number of items that can be processed.

5. If necessary, add the labor hours and the batch ID.

   You can enter labor hours by whole numbers. For example, typing 1 would equal 1 hour, typing .5 would equal 30 minutes, and typing 0.091666... would equal 5 minutes.

   The labor hours added for the time tracking record can be viewed in the production schedule or project schedule, if necessary.

   The batch ID can be any identification associated with the item, such as the shift or work order number.

6. Tap the **Completed By** list and select the Tekla EPM user that has completed the item.

7. Tap **Add**.

8. To confirm adding the record, tap **Confirm**.

The quantity and weight of items that have completed the selected station is updated.

Add a batch of production tracking records

1. Tap the **Add Batch** button on the right side of the station to which you want to add a batch of records.

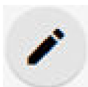
   You can see a list of the items that have not yet completed the station below the **Update All** section at the top of the page.

2. If necessary, set filters, so that only the items that you want to add to the record are shown.

   For example, you can filter the view so that only items with particular main marks are shown. For more information on filters, see Set and clear filters (page 12).

3. Do either of the following:

To	Do this
Enter the same information for all items	a. In the **Update All** section at the top of the page, tap the list and select the Tekla EPM user that has completed the item. b. To define the quantity of pieces that are added to the record, do any of the following:

To	Do this
	• To add the maximum quantities of all items in the record, tap the **Max Qty** button, and tap **OK**. • Type the desired quantity in the **Qty** field. If the quantity equals or is less than the quantity of pieces within an item, the item is highlighted with green. If the quantity exceeds the quantity of pieces within an item, the item is highlighted with red. c. If necessary, type the instance number in the available field. The gray number in the field shows the maximum number of items that can be processed. d. If necessary, type the labor hours per piece and the batch ID in the available fields. You can enter labor hours by whole numbers. For example, typing 1 would equal 1 hour, typing .5 would equal 30 minutes, and typing 0.091666... would equal 5 minutes. The batch ID can be any identification associated with the item, such as the shift or work order number.
Modify items individually	a. In the list of available items, tap the  button on the right side of the item that you want to modify. b. Type the desired quantity in the **Qty** field. The gray number in the **Qty** field shows the maximum number of items that can be processed. c. Tap the **Comp By** list and select the Tekla EPM user that has completed the item. d. If necessary, type the instance number in the available field. The gray number in the field shows the maximum number of items that can be processed.

To	Do this
	e. If necessary, type the labor hours per piece and the batch ID in the available fields. You can enter labor hours by whole numbers. For example, typing 1 would equal 1 hour, typing .5 would equal 30 minutes, and typing 0.091666... would equal 5 minutes. The batch ID can be any identification associated with the item, such as the shift or work order number.

4. To save the record, tap **Update**.

Tekla EPM Go notifies you that the items have been successfully updated. After that, the updated items disappear from the view.

If necessary, clear the current filter and set a new one. For more information on filters, see Set and clear filters (page 12).

Delete items from a production tracking record

Deleting items from production tracking records is permanent and cannot be undone. The items that are deleted from the record are returned to the list of items that remain to be completed.

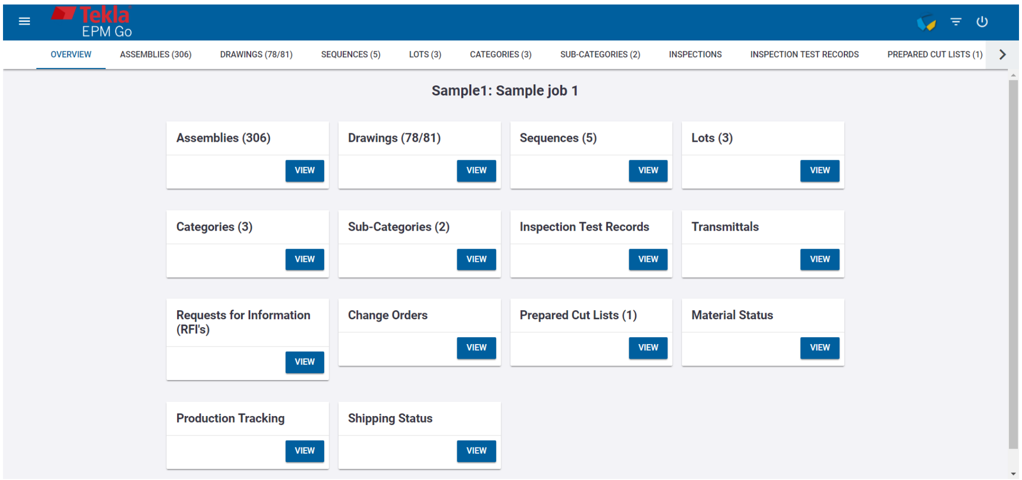
1. Tap the  button on the right side of the desired station.
2. Scroll to the record from which you want to delete items.
3. Tap the  button on the right side of the record.
4. Type the quantity of pieces that you want to delete from the record.
5. To permanently delete the pieces from the record, tap **Confirm**.

View and modify shipping information

In Tekla EPM Go, you can view the shipped and unshipped loads in a job, add loads, modify the material items on loads, create and view bill of lading reports, ship loads, and return shipped items.

1. On the homepage, scroll to the job whose shipping information you want to view and modify.
2. Tap **Open Project**.

The job information view opens.



3. Do any of the following:
   - At the top of the page, tap **Shipping Status**.
   - In the **Shipping Status** box, tap **View**.

   The shipping destinations in the current job are shown.

   You can see the quantity and weight of the items that are required to be shipped to the destination, the items that have already been shipped, and the items that remain to be shipped.
4. Scroll to find the destination whose loads you want to view and modify.
5. Tap the  button.

The loads that have been shipped to the current destination are shown.

To view loads that have not yet been shipped or that have been returned, tap the **Show Unshipped Loads** button. To hide these loads, tap the **Hide Unshipped Loads** button.

Add a load

1. Tap the **Show Unshipped Loads** button.
2. Tap the **Add** button.
3. Type the load number, trailer number, carrier, and load capacity.
4. If the load has an intermediate shipping location and needs to be returned to the jobsite, select the **To Be Returned** check box.
5. Tap **Add Load**.

6. Tap **Confirm**.

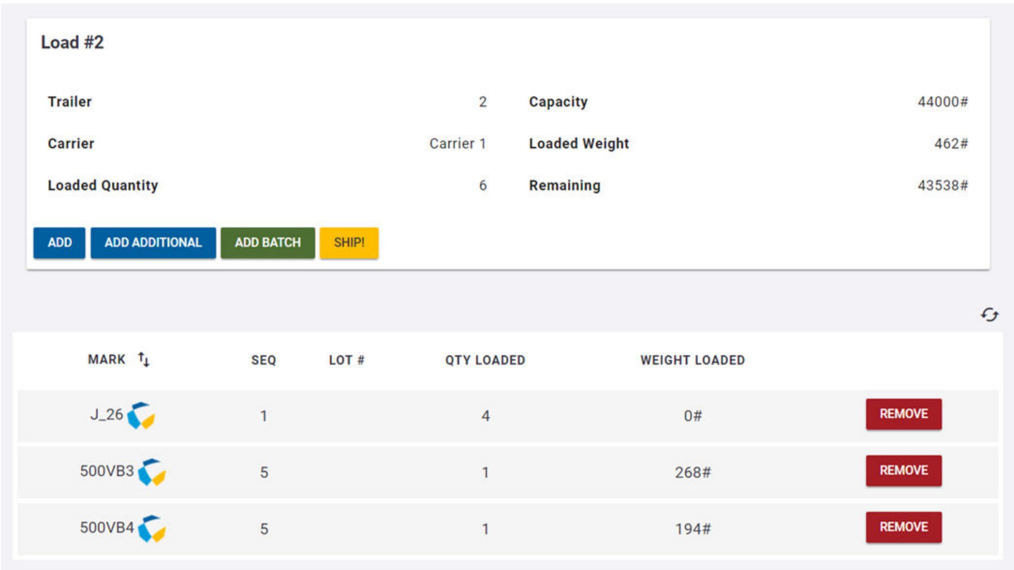
The load is added to the list of unshipped loads. You can now add material items to the load.

Add items to a load

1. In the list of unshipped loads, scroll to the load whose materials you want to modify.
2. Tap the **Material** button.

   The material items on the load are shown.

   Items can be pre-assigned to a load in the Tekla EPM desktop application. If items have been pre-assigned to the selected load, they are shown in the load view. You can easily load the pre-assigned items by clicking the **Load** button next to the items.



3. Do any of the following according to your needs:

To	Do this
Add a single item	a. Tap the **Add** button. b. Tap the **Main Mark** and **Sequence** lists to select the main mark and sequence of the item. c. Type the quantity of pieces that you want to add. d. Tap the **Add** button. e. Tap **Confirm**.

To	Do this
Add a batch of items	a. Tap the **Add Batch** button. You can see a list of the items that can be added below the **Update All** section at the top of the page. b. If necessary, set a filter that only shows the items that you want to add to the load. For more information on filters, see Set and clear filters (page 12). c. In the **Update All** section at the top of the page, do any of the following: • To add the maximum quantities of all items on the load, tap the **Max Qty** button, and tap **OK**. • Type the desired quantity in the **Qty** field. d. Tap the **Date Of Shipment** field and modify the shipping date according to your needs. e. To add the items to the load, tap **Update**. The added items disappear from the list of items that can be added to the load. Repeat steps a to e to add all necessary items to the load until the trailer is at its capacity. You can see the weight of the items on the load and the trailer capacity at the bottom of the **Update All** section.
Add additional items	Additional items can be any miscellaneous items without main marks, such as bolts. a. Tap the **Add Additional** button. b. Type the quantity of additional items, the weight per item and the description of the additional items. c. If necessary, type any additional notes about the additional items. d. Tap the **Add** button.

Ship a load

You cannot ship a load that does not have any material items added to it.

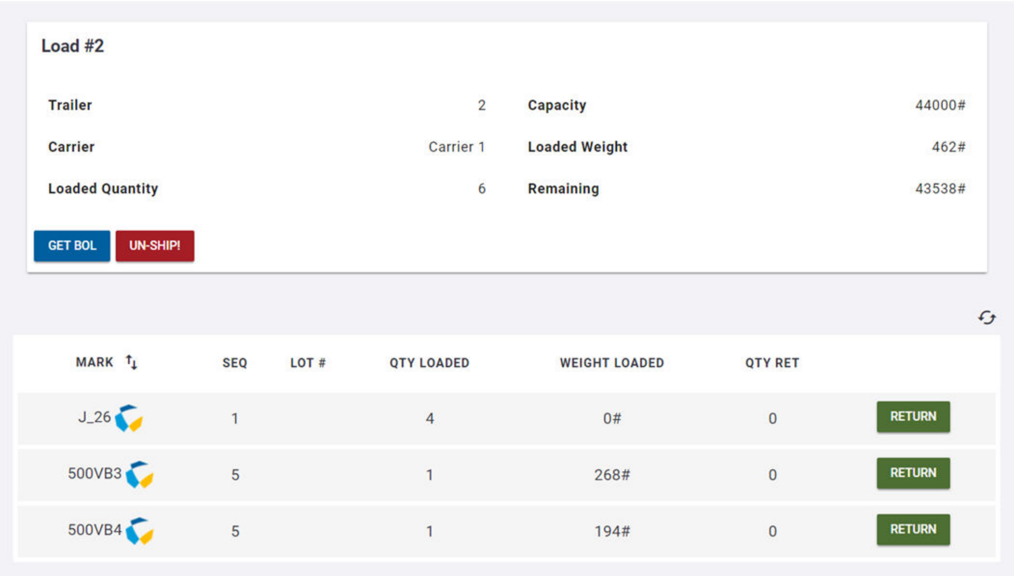
1. In the list of unshipped loads, scroll to find the load that you want to ship.
2. Tap **Ship!**

3. To ship the load, tap **Confirm**.

View or print the bill of lading

1. Scroll to find the shipped load whose bill of lading you want to view.
2. Tap the **Material** button.

   The materials on the load are shown.



3. Tap the **Get BoL** button.
4. Tap the **Report** list and select the report that you want to create.
5. According to your needs, select or clear the **Include cover sheet**, **Include notes**, and **Show logo** check boxes.
6. Tap **Make it!**

   A PDF version of the bill of lading report is downloaded onto your device.
7. Open the report to view or print it according to your needs.

Cancel shipping a load

If you need to modify a load that has already been marked as shipped, you can cancel shipping the load.

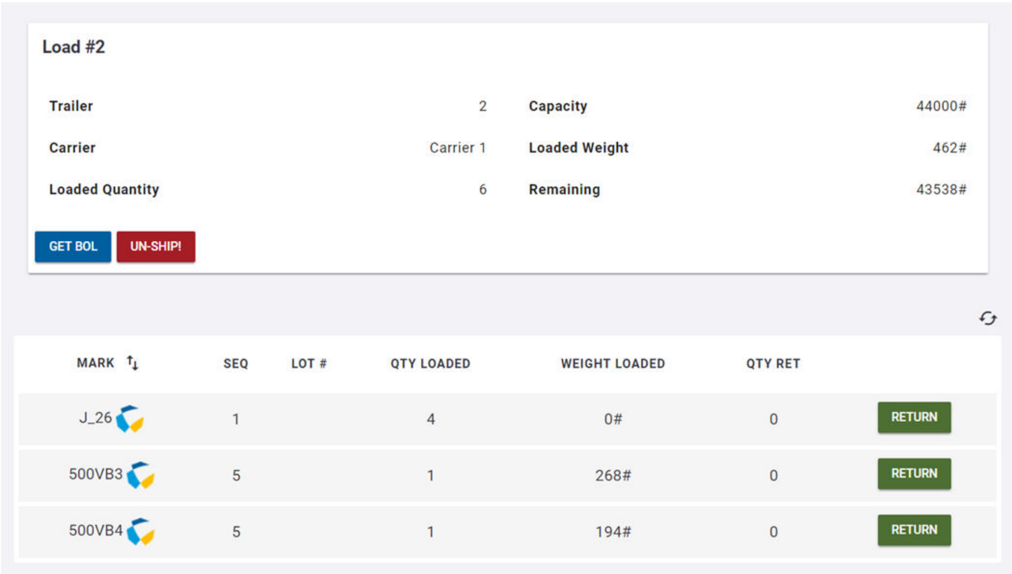
1. Scroll to find the load whose shipping you want to cancel.
2. Tap the **Un-Ship!** button.
3. To cancel shipping the load, tap **Confirm**.

Return shipped items

Use the **Return** command to return items that have been shipped to an intermediate destination and will later be added to another load. When you return the items, you can load the items on another load to with other items located in the shop.

1. Scroll to find the load on which you want to return items.
2. Tap the **Material** button.

   The materials on the load are shown.



3. Scroll to find the item that you want to return, or set a filter that only shows the desired items.

   For more information on setting filters, see Set and clear filters (page 12).
4. Tap the **Return** button.
5. In the **Quantity to Return** field, type the number of pieces that are returned.
6. Tap the **Return** button.
7. Tap **Confirm**.

The selected number of pieces can now be added to another load.

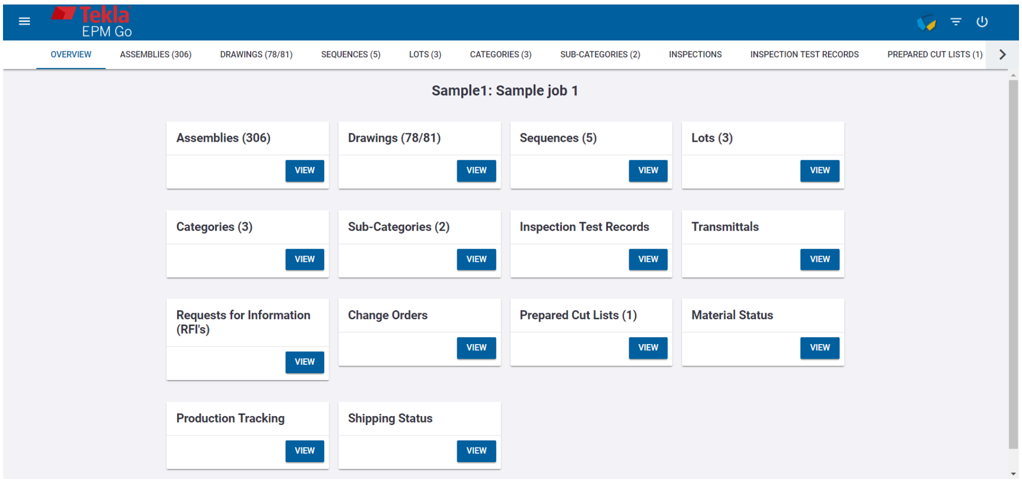
If you need to cancel returning an item, tap the **Un-Return** button and type the quantity of pieces whose returning you want to cancel.

View the project schedule of a job

You can view the current schedule of a project in Tekla EPM Go. Note that project schedules can only be modified in the Tekla EPM desktop application.

1. On the homepage, scroll to the job whose drawings you want to view.
2. Tap **Open Project**.

   The job information view opens.

3. Tap the file menu icon ( ) in the upper-left corner.
4. In the menu, select PROJECT.

   The project schedule opens.
5. To change which information is viewed in the project schedule, do any of the following:
   - To change the scale with which the project schedule is viewed, select an option above the project schedule, and tap **Show it!** to update the project schedule.
   - To collapse or expand the tasks in the project schedule, in the **Rows** section, tap the available buttons to collapse or expand the rows.
   - To change which properties are shown in the project schedule, in the **Columns** section, select or clear check boxes next to the properties that you want to see or do not want to see.

1.4 View and manage inventory materials

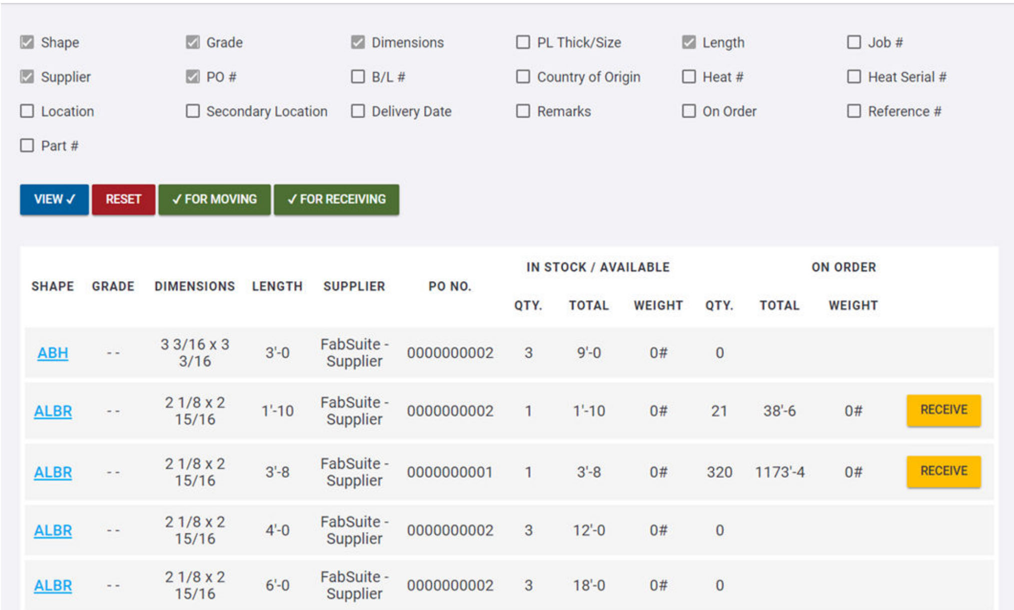
In Tekla EPM Go, you can view the material items in the inventory. You can also receive material items or move material items to other inventory locations.

1. Tap the file menu icon ( ) in the upper-left corner.
2. In the menu, select **Inventory**.

3. Depending on which material items you want to view, select one of the following options:
   - **Received / On Hand Only**: shows the material items that are in stock.
   - **On Order Only (Receiving)**: shows and allows you to receive material items that are on a purchase order.
   - **Both On Hand and On Order**: shows all material items on a purchase order and in stock.
4. Tap the arrow on the right side of the **Initial View** list and select the property according to which the material items should be sorted.

   Note that selecting a high level property for the initial view makes it quicker and easier to filter the shown inventory items.
5. Tap **View Inventory**.

   The material items are shown.



6. To define which properties of material items are shown, select the applicable check boxes at the top of the page.

   For example, if you want to view the job number and the bill of lading number, select the **Job #** and **B/L #** check boxes.

   Items without a job number are open stock.

   You can select nine check boxes at a time.
7. To update the material item properties that are shown, tap **View**.

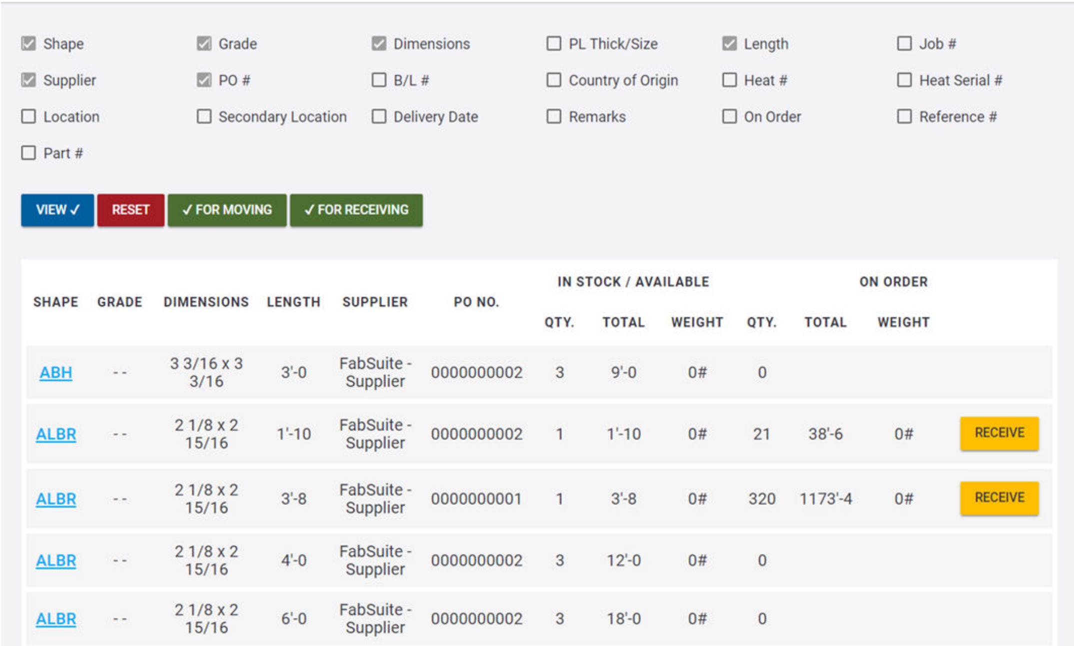
See also

Move inventory items to another inventory location (page 40)

Receive inventory items (page 0)

Move inventory items to another inventory location

Use the **Move** button in Tekla EPM Go to change the inventory location of items.



1. In the inventory view, tap the **For Moving** button.

   The inventory view updates so that you can move material items.

2. Scroll to the material item that you want to move, and tap the **Move** button.

   Note that you cannot move any items that are not in stock.

3. Type the quantity of pieces that you want to move.
4. Define the inventory location, and if necessary, the secondary inventory location.
5. Tap the **Move** button.
6. Tap the **Confirm** button.

   Repeat steps 2 to 6 for all items that you want to move to new inventory locations.

7. When you are ready, tap the **Reset** button to reset the inventory view.

Receive inventory items

In Tekla EPM Go, you can mark inventory items as received.

1. In the inventory view, tap the **For Receiving** button.

   The inventory view updates so that you can receive material items.

2. Scroll to the material item that you want to receive, and tap the **Receive** button.
3. Type the quantity of items that is received.
4. According to your needs, type the bill of lading number, heat number, location, and secondary location.
5. Tap the arrow on the right side of the **Country Of Origin** list, and select the country of origin.
6. Tap **Receive**.
7. Tap **Confirm**.

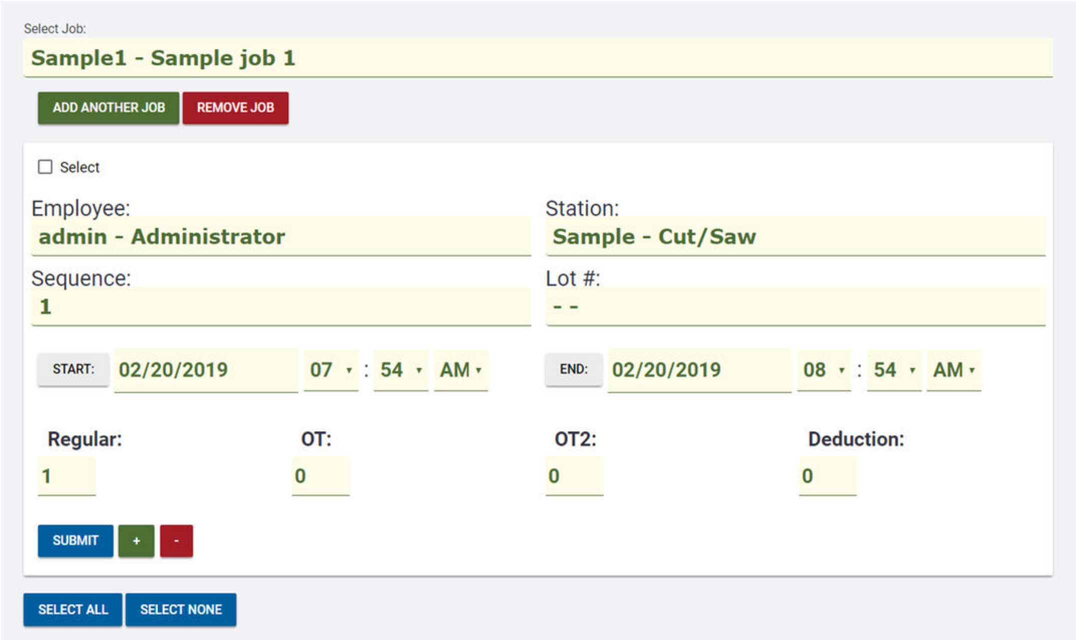
   Repeat steps 2 to 7 to receive all necessary material items.

8. When you are ready, tap **Reset** to reset the inventory view.

1.5 Add time tracking records

In Tekla EPM Go, you can add labor time to multiple production control jobs. The regular labor hours that is added shows in both the production schedule and the project schedule.

1. Tap the file menu icon () in the upper-left corner.
2. In the menu, select **Time Tracking**.



You can now add time tracking records.

Add time tracking records

1. Tap the **Select Job** list to select the job for which you want to add labor time.

   A section for adding the time tracking record is shown.

   The available fields are set in the time tracking settings in the Tekla EPM desktop application.

2. Tap the available fields to select or type the employee, station, and other necessary information.

3. Modify the start and end times by tapping the date and time fields and tapping the arrow buttons to change the values.

   The time tracking settings set in the Tekla EPM desktop application determine if multiple time tracking records of the same user can overlap or not.

   The regular labor hours are automatically calculated based on the start and end times.

4. If necessary, modify the regular, overtime, double overtime, and deduction hours in the available fields.

   The **Deduction** field is meant for the time that is used for unpaid activities, such as lunch. This time will not be logged against the project, ask, station, sequence, or lot.

5. If you want to add more than one time tracking record at a time, do any of the following:

To	Do this
Add more time tracking records for the current job	• Tap the **+** button at the bottom of the current time tracking record.
Add time tracking records for another job	a. Tap the **Add Another Job** button. b. In the **Select Job** list, tap the job to which you want to add a time tracking record.

A new time tracking record appears under the current one.

Repeat steps 2 to 5 for all the time tracking records that you want to add.

6. To submit the time tracking records, do any of the following:

To	Do this
Submit one record	• Tap **Submit** at the bottom of the time tracking record.
Submit multiple records	a. Select the **Select** check box in the upper-left corner of the desired time tracking records. b. Tap **Submit Selected** below all time tracking records.
Submit all records	• Tap **Submit All** below all time tracking records.

The time tracking records are added for the selected jobs.

You can view the added time tracking records in the **Time Tracking Detail** dialog box in the Tekla EPM desktop application. For more information, see .

Delete time tracking records

You can delete any time tracking records that have not yet been submitted.

- Tap the **-** button at the bottom of the time tracking record.

The record is deleted.

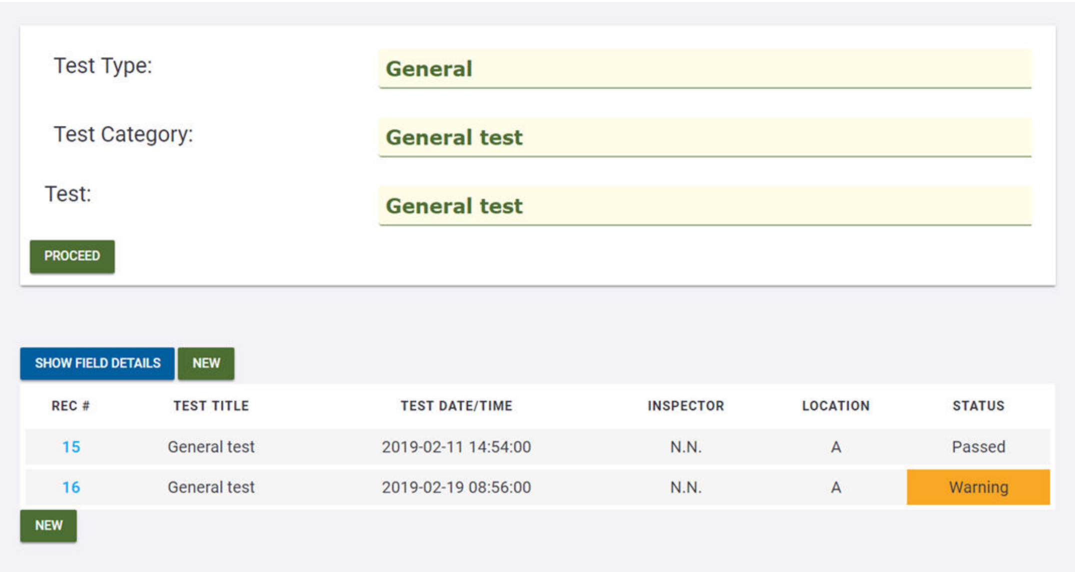
1.6 View and modify general inspection test records

All inspection test types except for the **Assembly**, **Part**, and **Load** test types are considered general inspection tests. The available general test types are set in the Tekla EPM desktop application. You can view the inspection records of the general test types in Tekla EPM Go by selecting the **General Inspections** option. You can also add, modify, and delete general inspection test records.

1. Tap the file menu icon ( ) in the upper-left corner.
2. In the menu, select **General Inspections**.
3. Tap the available lists to select the test type, test category, and test that you want to run.

   The test types, categories, and test names are created in the Tekla EPM desktop application.
4. Tap **Proceed**.

The existing inspection test records that match the test type, category, and test name are shown.



If you want to show more information about the field values within the records, tap **Show Field Details**. You can hide the field values by tapping **Hide Field Details**.

Add an inspection test record

1. Tap **New**.
2. Tap the available lists to select the inspection location and inspector.
3. Define the test hours.
4. Add any other necessary information in the available fields.
5. To attach a file to the record, do the following:
   a. Tap **Add File**.
   b. Browse to find the file that you want to attach and select it.

    c. Tap **Open**.
    d. Type a description for the file.

    To add more files, repeat steps a to d.

6. When you are ready to submit the record, tap **Submit Now**.
7. Tap **Confirm**.

The inspection test record is added to the list of visible test records.

Add a follow-up test record

Adding a follow-up test record allows you to change the test status from failed to passed without losing the original failed test record.

1. In the **Rec #** column, tap the inspection test record to which you want to to add a follow-up test record.
2. At the bottom of the inspection test record view, tap **Run Follow-up Test**.
3. Tap the available lists to select the inspection location and inspector.
4. Define the test hours.
5. Add any other necessary information in the available fields.
6. To attach a file to the record, do the following:
    a. Tap **Add File**.
    b. Browse to find the file that you want to attach and select it.
    c. Tap **Open**.
    d. Type a description for the file.

    To add more files, repeat steps a to d.

7. When you are ready to submit the record, tap **Submit**.
8. Tap **Confirm**.

The follow-up test record is added to the list of visible test records.

Once you have added a passed follow-up test record, the status of the original test record changes from `Failed` to `Failed (FTP)`. This indicates that a passed follow-up test has been run for the original test record.

The status of the passed follow-up test record value reads `Passed (FT)` to indicate that the record is a follow-up test record.

Modify an inspection test record

1. Scroll to find the inspection test record that you want to modify.

2. Tap the record number in the **Rec #** column.

   The record details are shown.
3. At the bottom of the record details, tap **Edit Test Record**.
4. Tap the available lists to change the inspection location and inspector.
5. Modify the test hours.
6. Modify any other necessary information in the available fields.
7. To attach a file to the record, do the following:
   a. Tap **Add File**.
   b. Browse to find the file that you want to attach and select it.
   c. Tap **Open**.
   d. Type a description for the file.

   To add more files, repeat steps a to d.
8. To update the record, tap **Submit**.
9. Tap **Confirm**.

Delete an inspection test record

1. Scroll to find the inspection test record that you want to delete.
2. Tap the record number in the **Rec #** column.

   The record details are shown.
3. At the bottom of the record details, tap **Delete Test Record**.
4. To permanently delete the record, tap **Confirm** twice.

1.7 Sign out of Tekla EPM Go

To sign out of Tekla EPM Go:

- In the upper-right corner of the website, tap the  button.

You are signed out of Tekla EPM Go, and you return to the sign-in page.

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